GENESIS PRO

User's Guide

2009

Read This First

Welcome

Welcome to Time America's Genesis Pro User's Guide. This manual is shipped with each new Genesis Pro software package and is intended solely for use by the licensee. This User Guide describes the installation and operation of the Genesis Pro system.

Accuracy of Information

The content of this manual is subject to change without notice. Before using this manual, verify that the information contained in it is current. Proper installation, configuration, and operation of the software are contingent upon reading and following the procedures contained in the latest revision of the manual.

Additional Copies

Additional copies of this manual may be obtained from our website at www.timeamerica.com or from your local Time America dealer.

User Comments

Every effort is made to ensure that the information contained in this manual is accurate at the time of publication. If you find an error or omission while reading this manual, direct your comments to:

Time America, Inc.
Attn: Technical Publications
15990 N. Greenway Hayden Loop
Suite D-500
Scottsdale, AZ 85260

Or you can send emails to:

training@timeamerica.com

We welcome your comments and suggestions.

Software Release Version

10.01b

TABLE OF CONTENTS

CHAPTER I ABOUT THIS MANUAL 10

DISCLAIMER 10
TECHNICAL SUPPORT 10
When Calling Technical Support for Assistance 10

CHAPTER II INSTALLATION 11

SYSTEM REQUIREMENTS 11
INSTALLING THE SYSTEM 11
HARDWARE KEYS 17
Main System Key 17
Polling Key 17
Demo Key 18

CHAPTER III GETTING STARTED 19

STARTING GENESIS PRO AND LOGGING IN 19
Note on User Accounts 19
Launching and Logging In to Genesis Pro 19
Exiting the System 20
TIPS AND TECHNIQUES 21
USING THE KEYBOARD 21
Underlined Letters 22
Hot Keys 22
Additional Keyboard Access 22
HELP 23
Access the Online Help Window 23
Use Help Contents 23
Use the Help Index 23
Use Help Find 24
Return to the Help Topics Window 24
Print a Help Topic 24
CONFIGURING THE SYSTEM ENVIRONMENT 25
Play Bell Tones 25
Change Screen Background 25
Navigation Selection 26

CHAPTER IV CONFIGURATION 27

MAIN COMPANY 28
DIVISIONS 36
Configure Divisions 36
Add a Division 37
Edit a Division 37
Delete a Division 37
CATEGORIES 39
Configure Categories 40
Add a Category 43
Edit a Category 44
Delete a Category 44
ATTENDANCE CODES 45
Configure Attendance Codes 45
Add an Attendance Code 46

Edit an Attendance Code *46*
Delete an Attendance Code *47*
POLICIES 48
Configure Policies *48*
Add a Policy *63*
Edit a Policy *64*
Delete a Policy *64*
ROUNDING 65
Configure Rounding Rules *65*
Add a Rounding Rule *70*
Edit a Rounding Rule *70*
Delete a Rounding Rule *70*
SHIFTS 72
Configure a Shift Group *72*
Add a Shift Group *80*
Edit a Shift Group *80*
Delete a Shift Group *81*
Add a Shift *81*
Edit a Shift *81*
Delete a Shift *82*
HOLIDAYS 83
Configure Holidays *83*
Add a Holiday *84*
Edit a Holiday *84*
Delete a Holiday *85*
HOLIDAYS GROUPS 85
Configure Holiday Groups *85*
Add a Holiday Group *86*
Edit a Holiday *86*
Delete a Holidays Groups *87*
GROUPS 87
Configure Groups *87*
Add a Group *88*
Edit a Group *89*
Delete a Group *89*
JOB COSTING 91
Departments *92*
Jobs *97*
Steps *102*
Operations *107*
Tasks *112*
BELL SCHEDULES 117
Configure Bell Schedules *117*
Add a Bell Schedule *118*
Edit a Bell Schedule *119*
Delete a Bell Schedule *119*
PROFILE LOCKOUTS 121
Configure Profile Lockouts *121*
Add a Profile Lockout *123*
Edit a Profile Lockout *124*
Delete a Profile Lockout *124*
REASONS 125
Configure Reasons *125*
Add a Reason *126*
Edit a Reason *126*
Delete a Reason *126*

SECURITY 127
Configure Security Levels *127*
Add a Security Level *139*
Edit a Security Level *139*
Delete a Security Level *140*
User Maintenance *140*
Who's Logged In *146*
Change Password *146*
BENEFIT ACCRUALS 146
Configure Benefit Accruals *147*
Configure Benefit Accumulators *149*
Add a Benefit Accruals Policy *152*
Edit a Benefit Accruals Policy *154*
Delete a Benefit Accruals policy *154*
Update to Current *155*
OCCURRENCE RATINGS 155
Configure Occurrence Ratings *155*
Add an Occurrence Rating *157*
Edit an Occurrence Rating *158*
Delete a Occurrence Rating *158*
Add Category and Attendance Infractions *158*
Edit a Category and Attendance Infraction *160*
Delete a Category and Attendance Infraction *160*
Add Attendance Notices *160*
Edit an Attendance Notice *162*
Delete a Category and Attendance Infraction *162*
Printing and Viewing Attendance Notices *162*

CHAPTER V OPTIONAL MODULES 165

JOB COSTING 165
BELL SCHEDULES 165
PROFILE LOCKOUTS 166
BENEFIT ACCRUALS 166
OCCURRENCE RATINGS 166
PC CLOCK 167
WEBCLOCK 167
VIDEX DURATRAX 167
THIRD PARTY TERMINALS 167

CHAPTER VI ADDITIONAL EMPLOYEE FEATURES 168

EMPLOYEE REVIEWER 168
Accessing Employee Reviewer *168*
Employee Timecard Tab *169*
Employee Schedules Tab *173*
EMPLOYEE TRANSACTIONS TAB 175
Description *175*
Employee Benefits Tab *177*
EMPLOYEE TIMESHEETS 178
Accessing Employee Timesheets *178*
Using Employee Timesheets *178*
PC CLOCK 181
Who Can Clock In and Out with PC Clock? *181*
Accessing PC Clock *181*
Default Settings to Use PC Clock *181*
Default Keys *182*
Other Key Functions *183*

WEBCLOCK 184
Who Can Clock In and Out with WebClock? *184*
Accessing WebClock *184*
Clock Functions *185*
The Extras *191*
Supervisor Functions *200*

CHAPTER VII EMPLOYEE MAINTENANCE 204

CONFIGURE EMPLOYEE 204
EMPLOYEE LIST 205
EMPLOYEE TIMECARD (DESCRIPTION) TAB 207
EMPLOYEE SCHEDULE TAB 211
Configure Employee Schedules *211*
Assign or Edit an Employee Schedule *213*
Delete a Schedule *215*
Create a Rotating Schedule *215*
Create an Employee Schedule Template *217*
Copy an Employee Schedule Template *217*
EMPLOYEE TRANSACTIONS TAB 220
Description *220*
EMPLOYEE STATUS TAB 221
Configure Employee Status *221*
Add Employee Status *222*
Edit Employee Status *223*
Delete Employee Status *223*
EMPLOYEE BENEFITS TAB 224
Benefit Entitlement: Configure *224*
Benefit Entitlement: Employee Benefit Details *225*
Benefit Entitlement: Grant Benefit Time *226*
Benefit Entitlement: Delete a Detail *226*
Benefit Accruals: Configure *227*
Benefit Accruals: Update Employee Benefits *228*
Benefit Accruals: Employee Benefit Details *228*
Benefit Accruals: Manual Benefit Adjustment *230*
Benefits Accrual: Delete a Manual Adjustment *231*
EMPLOYEE MESSAGES TAB 231
Configure *231*
Add a Message *232*
Edit a Message *233*
Delete a Message *233*
EMPLOYEE WAGES 234
Configure Employee Wages *234*
Add a Global Wage *236*
Edit a Global Wage *236*
Delete a Global Wage *236*
Add an Employee Level Wage *237*
Edit an Employee Level Wage *238*
EMPLOYEE BADGES TAB 239
Configure Employee Badges *239*
Add a Badge *239*
Edit a Badge *240*
Delete a Badge *240*
EMPLOYEE PROFILES TAB 240
Configure Employee Profiles *240*
Add a Profile *241*
Edit a Profile *242*

Delete a Profile *243*
EMPLOYEE CLOCKS TAB 243
Configure Hand Readers *243*
Configure TA7000 ..... *244*
EMPLOYEE DETAILS TAB 245
Configure Employee Details *245*
Add an Employee *248*
Edit an Employee *249*
Delete an Employee *249*

CHAPTER VIII TIMECARD AND TRANSACTION MAINTENANCE 251

ONLINE TIMECARD 251
Accessing the Online Timecard from the Configure Employee Screen *251*
Accessing the Online Timecard from the Approval Editor *252*
NAVIGATING IN THE ONLINE TIMECARD TAB 252
NAVIGATING IN THE TRANSACTIONS TAB 253
ADDING AND EDITING TRANSACTIONS 253
Add Transaction *254*
Add Miscellaneous Transaction *255*
Edit a Transaction *257*
Edit/Add Start *258*
Edit/Add Stop *259*
Multiple Miscellaneous *259*
From Schedule *262*
DELETE A TRANSACTION 263
AUDIT TRAILS 263
Print the Audit Trails *264*
APPROVAL EDITOR 266
TASK ORGANIZER 270

CHAPTER IX GLOBAL COMMANDS 272

SELECTING EMPLOYEES IN GLOBAL OPERATION DIALOG BOXES 272
Select Employees Individually *272*
Select Employees Globally *272*
Select Employees by Group *272*
Select Employees by Division *273*
GLOBAL MESSAGE ASSIGNMENT 273
GLOBAL PROFILE ASSIGNMENT 274
GLOBAL IP ACCESS 275
GLOBAL SCHEDULE ONE DAY ASSIGNMENT 276
GLOBAL SCHEDULE COPY 277
GLOBAL STATUS ASSIGNMENT 279
MULTIPLE SCHEDULE ADJUSTER 280
GLOBAL ADD TRANSACTION 282

CHAPTER X REPORTS 284

IMPORTANT INFORMATION ON PRINTING REPORTS 284
Configure Printer *284*
RUNNING A REPORT 285
Running a Report by Range *285*
Running a Report by Individual *290*
ON SCREEN REPORT PREVIEW 295
EMAILING A REPORT 297
REPORT EDITOR 298
Report Maintenance *299*
Relocate a Report *299*

Copy a Report *300*
Modify a Report *302*
Delete a Copied Report *303*

CHAPTER XI TERMINAL CONFIGURATION 304

TYPES OF CONNECTIONS 304
TA500, TA600 AND TA7000 SERIES (TA520/530, TA620, TA7000) 305
Configure a TA500/TA600/TA7000 Series Clock *305*
TA715, TA777 AND TA780 SERIES 321
Configure a TA715/TA777/TA780 Series Clock *321*
PC CLOCK 335
Configure a PC Clock *336*
WEBCLOCK 342
Configure a WebClock *342*
Configuring TimeSheet Submittal *346*
TASC 350
Configure a TASC Clock *350*
ATS SERIES CLOCKS 357
Configure ATS Clocks *357*
HAND READER CLOCKS 362
Configure a Hand Reader Clock *362*
CUSTOMIZING FUNCTION KEYS 370
Pre-Defined Function Keys *371*
Available Functions *371*
Available Classes *372*
Customize Function Keys *375*
ADD A CLOCK 379
EDIT A CLOCK 380
DELETE A CLOCK 380
VIDEX DATA COLLECTORS 382
ADD A DATA COLLECTOR 384
EDIT A DATA COLLECTOR 385
DELETE A DATA COLLECTOR 386
SET DATE AND TIME 386

CHAPTER XII TERMINAL POLLING AND AUTOPROCESSING 388

POLLING 388
Polling Time Clocks *388*
Polling Videx DuraTrax *390*
CONFIGURE AN AUTOPROCESS 392
Run as Service *393*
Add an AutoProcess *393*
Edit an Auto Process *398*
Delete an AutoProcess *399*
Replicate an AutoProcess *399*

CHAPTER XIII UTILITIES 400

IMPORTING 400
Advanced Import *400*
Import Benefits *402*
EXPORTING DATA 404
SYSTEM UTILITIES 406
Reindex Database *407*
Repair Database *407*
Update Databases *408*
Initialize Databases *408*

Change Employee Number *409*
Change Employee Number Width *409*
Print Barcodes *410*
Set Reprocess Date *413*
Fix Unassigned Badges *414*
Restore Original Reports *415*
Repost from R-Files *415*
Purge R-Files *416*
Post Historical Data *417*
Archive *417*
Restore Archive *419*
System Backup *420*
System Restore *421*
ADDITIONAL UTILITIES 422
Calculator *422*
About *423*
System Configuration *423*
Conversion Table *424*
Macros *425*

Chapter I About this Manual

This section describes how to use this manual. In addition to providing you with step-by-step knowledge for performing various procedures, this manual will help you get the most out of Genesis Pro.

Disclaimer

Every attempt is made to keep this manual up-to-date. However, software enhancements do occur, and the content of this manual is subject to change without notice. Before using this manual, verify that the information contained in it is current. Proper installation, configuration, and operation of the software are contingent upon reading and following the procedures contained in the latest version of the manual.

Technical Support

If you encounter a problem or need technical support after reading this manual, please contact your local Sales and Service Representative. Your local representative has received training in the areas of software installation, configuration, operation, and advanced troubleshooting. They are qualified to provide you with the highest level of technical support.

When Calling Technical Support for Assistance

If possible, contact your authorized local Sales and Service Representative while at the computer experiencing the problem so you can quickly answer questions and implement the solutions suggested by your representative.

Before calling, gather the following information. Your local Sales and Service Representative will need this information to assist you.

- The version and serial number of your Genesis Pro software.
- The name and version of the Operating System. The type of network being used (if applicable).
- The model number and EPROM revision of the data collection terminal(s) used with the Genesis Pro software.
- The name of all software options and/or modules installed.
- The make and model of the host computer (PC).
- The operations being performed when the problem occurred.
- A printout of any error message that was displayed.

© January 2009 Time America, Inc.

Chapter II Installation

This section describes how to install the Genesis Pro software, the Sentinel System Driver, and attach the hardware key.

System Requirements

To use the Genesis Pro system, the following are the recommended minimum system requirements must be present.

- Windows 95/98/2000/NT/ME/XP.
- Pentium III 500 or better.
- 128MB of total memory (RAM).
- A mouse, trackball, or other pointing device.

Additional Requirements

- 500MB of available disk space either on a workstation or accessible on a network drive.
- **NOTE**: A dedicated database server is not required.
- Additional disk space and an enhanced wide-area network connection may be required based on the number of employees, network distance, communication method, and the amount of live data contained in the system.

Polling PC

- An available serial port with a default address and interrupt.
- An available parallel port.

Installing the System

NOTE: Do not launch or run any other applications during the installation process.

1. Insert the Genesis Pro Installation CD into the CD ROM drive of the computer on which you wish to install the software. The *InstallShield Wizard* should automatically appear.
2. If the InstallShield does not automatically run, you may start the installation by navigating to My Computer and double-clicking the icon for **GENPRO**.

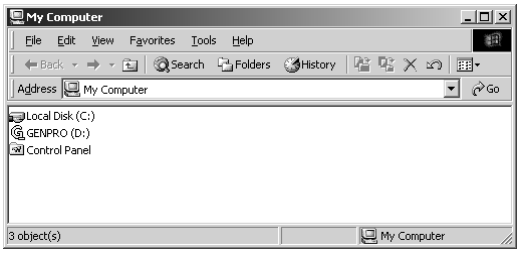


Figure 1: My Computer

3. The *Genesis Pro Setup* window will appear.

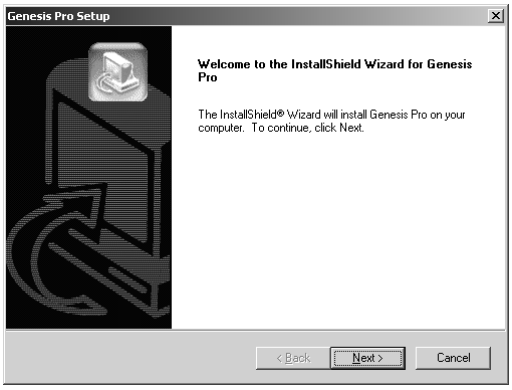


Figure 2: Genesis Pro Setup Wizard

4. Click the **Next** button to advance to the next screen. The *License Agreement* screen will appear.

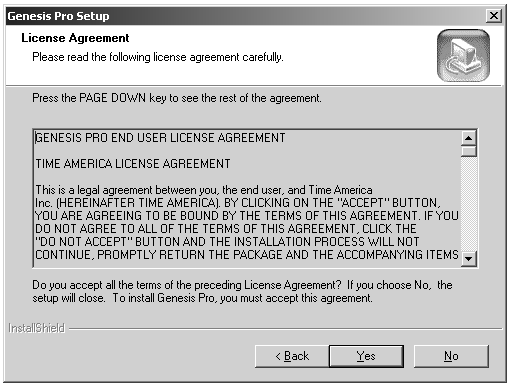


Figure 3: Genesis Pro License Agreement

5. Click **Yes** to accept the License Agreement. The *Choose Destination Location* screen will appear.

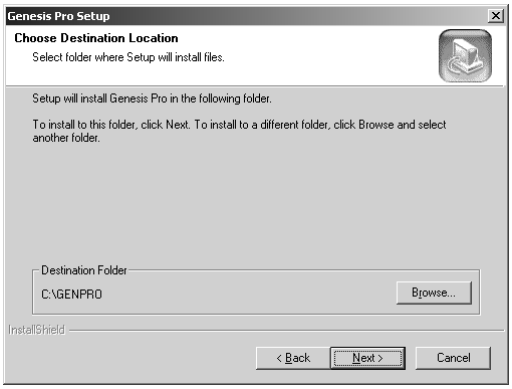


Figure 4: Choose Destination Location

6. Genesis Pro will be installed in the C:\GENPRO directory by default. If you wish to install to a different directory, click the **Browse** and select the directory to which you wish to install. Click the **Next** button when you are ready to proceed. The *Setup Type* screen will appear.

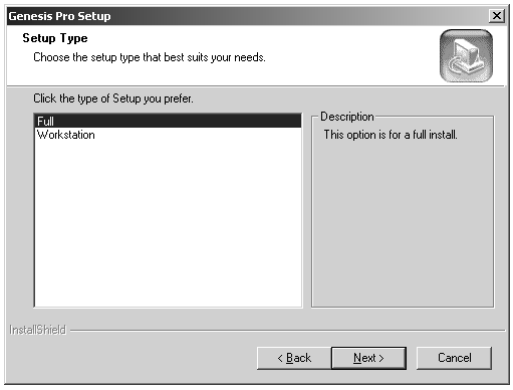


Figure 5: Setup Type

7. Choose the type of installation you wish to perform.
    a) **"Full"** will install both the software and the database files on this computer. (Typical)
    b) **"Workstation"** will install just the software.
8. Click the **Next** button to continue with the installation. The *Select Program Folder* screen will appear.

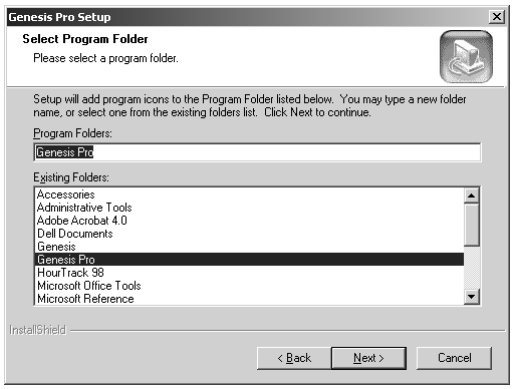


Figure 6: Select Program Folder

9. The Genesis Pro folder will be created automatically. You may type a new folder name if you wish. Click **Next** to continue. The installation will begin.

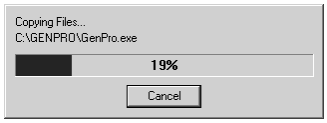


Figure 7: Genesis Pro Installation Progress

10. When the installation is finished, the *InstallShield Wizard Complete* screen will appear. Click the **Finish** button to proceed.
11. If you selected "**Full**" in the Setup Type screen, the *Sentinel System Driver* installation will begin automatically. If you selected "**Workstation**," the installation will end at this point.

Figure 8: Sentinel Driver Installation

12. The *Sentinel System Driver—InstallShield Wizard* will appear. The Sentinel System Driver is necessary for Genesis Pro to be able to access the database files.

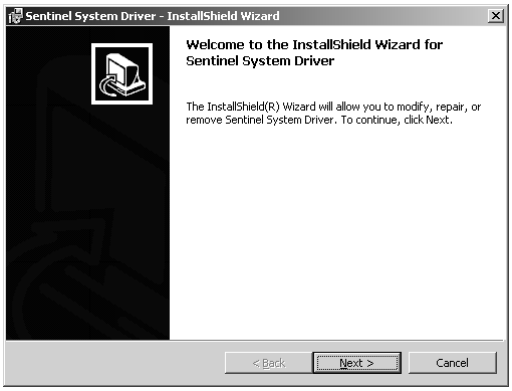


Figure 9: Sentinel InstallShield Wizard

13. Click the **Next** button to begin the Sentinel System Drive Installation. The *Setup Type* screen will appear.

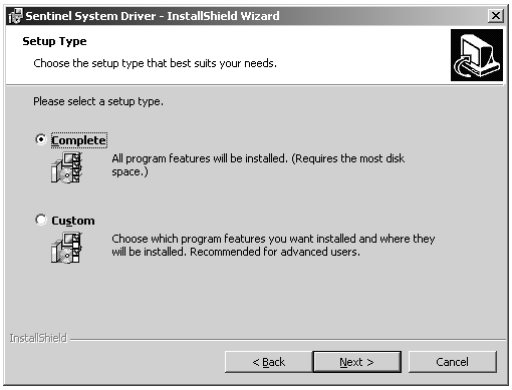


Figure 10: Sentinel Driver Setup Type

14. Verify that **Complete** is selected and click **Next** to continue. The *Ready to Install* screen will appear.

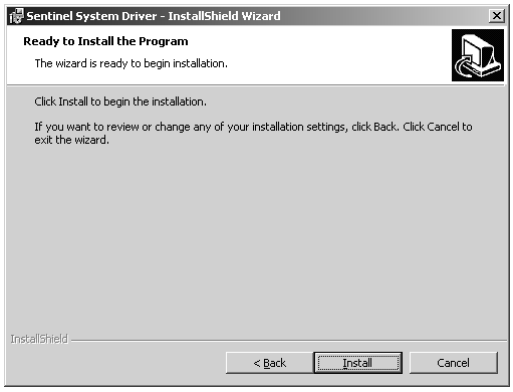


Figure 11: Ready to Install

15. Click **Install** to begin the installation.

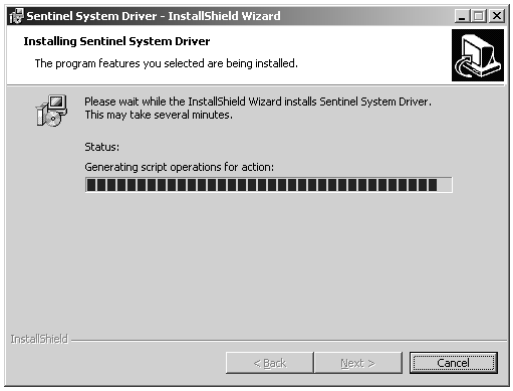


Figure 12: Sentinel Drive Installation

16. When the installation is finished, the *InstallShield Wizard Complete* screen will appear. Click the **Finish** button to proceed.

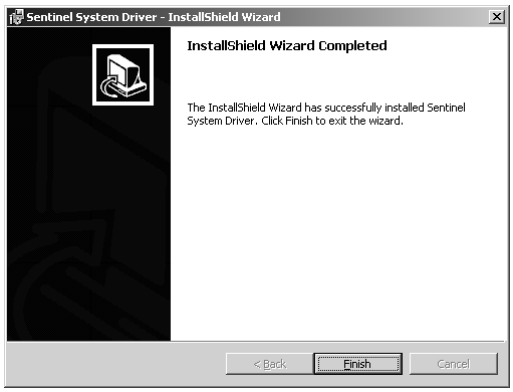


Figure 13: Installation Complete

17. This concludes the installation. The *Installation Complete* message will appear.

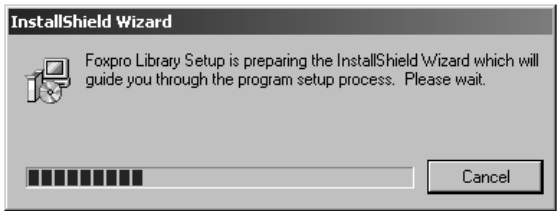


Figure 14: FoxPro LIB Installation

18. The *FoxPro LIB—InstallShield Wizard* will appear. The FoxPro LIB is for the Genesis Pro database files.

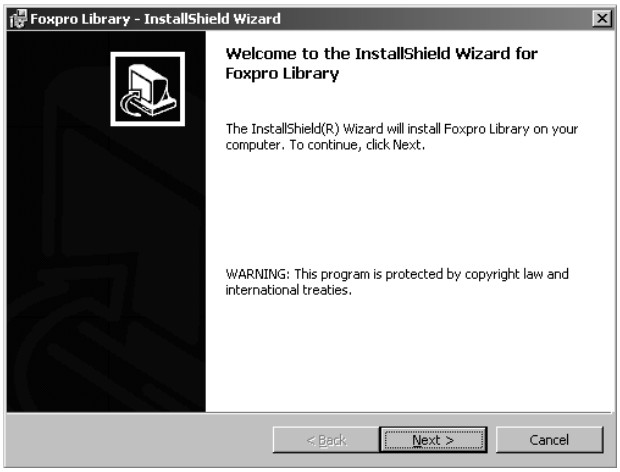


Figure 15: FoxPro InstallShield Wizard

19. Click the **Next** button to begin the FoxPro LIB installation. The Ready to Install screen will appear.

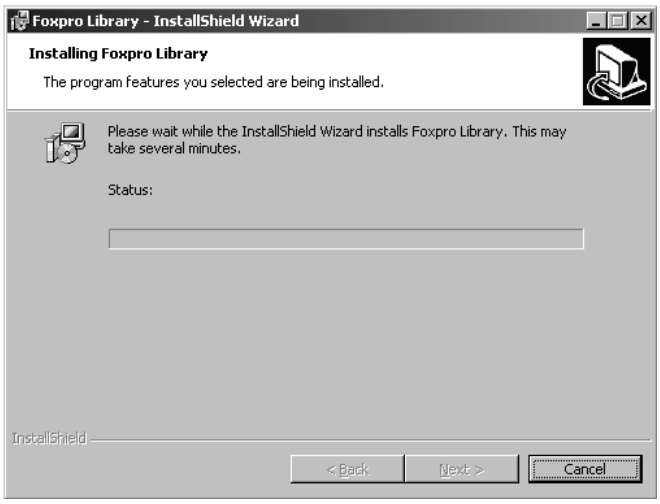


Figure 16: FoxPro LIB Installation

20. When the installation is finished, the *InstallShield Wizard Complete* screen will appear. Click the **Finish** button to proceed.

21. Click **OK**. Genesis Pro will now appear in your Start Menu and on your desktop.
22. You must attach a hardware key to the computer's parallel port prior to being able to start and operated Genesis Pro. See ***Hardware Keys***.

Hardware Keys

When the installation is complete, a hardware key must be attached to the computer's parallel port in order to start and operate the Genesis Pro software. There are three types of hardware keys - each designed for a specific purpose.

- Main System Key
- Polling Key
- Demo Key

Attach the hardware key to the computer's parallel port. If you have a printer attached to the parallel port, place the hardware key between the computer's parallel port and the printer cable as shown in Figure 17: Using a Hardware Key with a Printer Cable below.

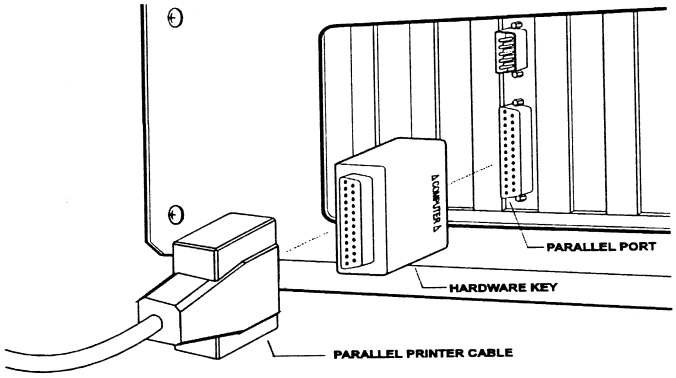


Figure 17: Using a Hardware Key with a Printer Cable

When the system is first launched, Genesis Pro searches for and verifies the presence of a hardware key. If a key is not found, the system will not start.

Main System Key

The Main System Key is shipped with each new software package. One key per system is required. The Main System Key allows you to start and operate the software as well as poll your time clock(s). The Main System Key is identified by the code **4HJDAB-B** on the outer shell.

Polling Key

The Polling Key allows Genesis Pro to communicate with time clocks from a workstation other than where the Main System Key resides. This key is identified by the code **4EQSGH-B** on the outer shell.

On local or wide-area networks, a remote workstation can launch and operate the software as long as the Main System Key is detected somewhere on the network. However, the workstation cannot poll time clocks unless it has an Additional Polling Key attached.

Demo Key

The Demo Key is an accessory for resellers of Genesis Pro systems. This key is identified by the code **4EIWEH-B** on the outer shell.

The following restrictions are present when Genesis Pro detects the Demo Key:

- The Genesis Pro software is limited to five employees and two users.
- NOT FOR RESALE is displayed on all screens.

Chapter III Getting Started

This section explains how to launch the Genesis Pro system, including logging on and off, using Help, using the keyboard instead of the mouse and customizing the Genesis Pro environment.

Starting Genesis Pro and Logging In

Note on User Accounts

When starting Genesis Pro, you will be prompted for a User ID and password. The User ID and password are used to determine who is able to login and what areas of the program are accessible. These "User Accounts" are defined in the Security Access portion of Genesis Pro, which will be covered later in this manual.

SYSOP

There is a built-in administrator account that grants full access to all parts of the application. The User ID for this account is **SYSOP** and the initial password is "**password**." (This password can and should be changed.) This account will be referred to as SYSOP throughout this manual.

The first time you login, you must use the SYSOP account, as no other accounts exist. You will also use this account to perform system maintenance, etc. The SYSOP account can perform all functions within Genesis Pro, including certain database management functions that no other account can access.

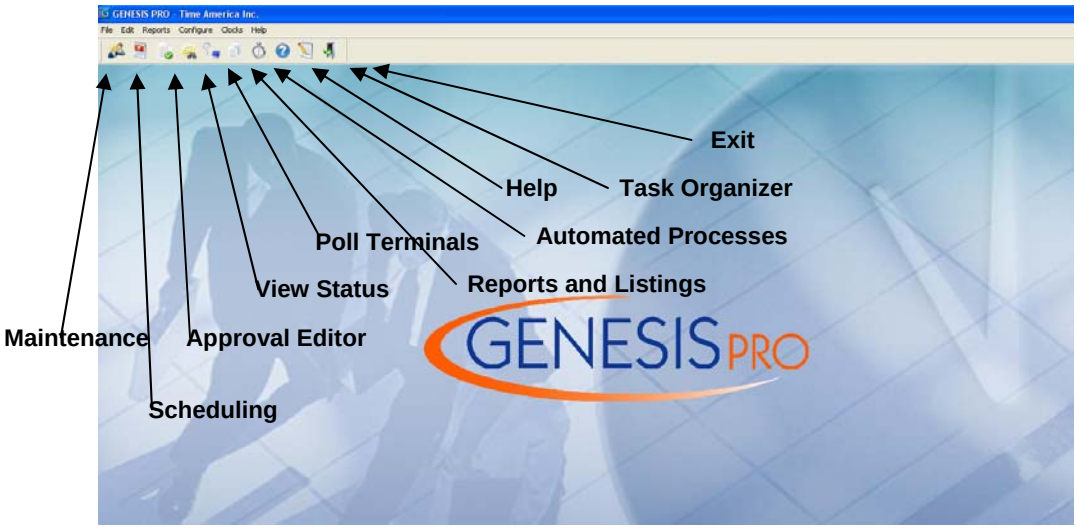
Launching and Logging In to Genesis Pro

The instructions in this section assume that you already know the User ID and password to be used. Check with your system administrator if you are unsure of which User ID to use.

23. Click the **Start**, **Programs**, **Genesis Pro, Genesis Pro**, or double-click the Genesis Pro Icon on the Desktop.
24. Genesis Pro will open and display the *Login* screen.

Figure 18: Genesis Pro Login Screen

25. Type your User ID in the **User ID** field, then press either **ENTER** or the **TAB** key to advance to the **Password** field.
26. Type your password in the **Password** field and press either **ENTER, TAB** or click **OK** to access Genesis Pro.
27. The *Main Window* will open.



Exiting the System

You can use any of the following methods to close or exit out of Genesis Pro.

- Click **File**, **Exit** on the menu bar.
- Click the **Exit** button on the toolbar.
- Click the Windows Close button (the **X** at the far right of the menu bar).
- Press **ALT+ F4** on the keyboard.

Tips and Techniques

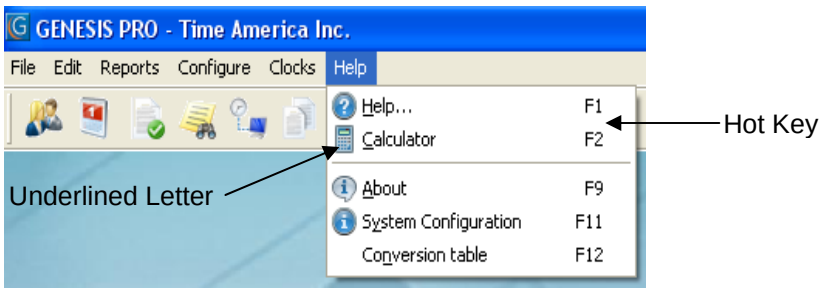
Genesis Pro is designed to be user-friendly, and as such there are common techniques to making working in Genesis Pro easier. Some of these tips are listed below.

Setting	Definition
Apply	You may click the **Apply** button in any screen to commit the changes you have made without exiting the current screen. This allows you to "save as you go" and is a good practice.
Name vs. Number listing	You will notice that most of the configuration dialog boxes provide a list of the existing items at the side of the screen. (For example, the *Divisions* dialog box gives you a list of Divisions.) These lists can be sorted according to **Name** or **Number**, depending upon your preference.
Show Inactives	Check this button to show inactive items in the list at the side of any dialog box.
Print	You may click the **Print** button in any dialog to print the report associated with the current screen. For example, clicking the **Print** button in the *Configure Category* dialog box prints the *Category Listing* report.
Cancel	You may click the **Cancel** button in any dialog box to close the screen without saving changes.

NOTE: The Employee Maintenance, Status Board and Multiple Schedule Adjuster sections will resize themselves according to the monitor resolution.

Using the Keyboard

Genesis Pro system is designed so you can perform all operations from your keyboard as well as with the mouse.



Underlined Letters

All menus, menu items, and buttons have an underlined letter, which allows keyboard access to that item.

- To access a menu, press the **ALT** key in conjunction with the letter that is underlined.
- To access an item on the menu, first open the menu and then press the letter that is underlined.
- To select a button, press the **CTRL** key in conjunction with the letter that is underlined

Keyboard Usage Examples

To:	Do This:
Select an item from the Main Window.	Press **ALT** and the underlined letter. For example, press **ALT+F** to open the **File** menu.
Select a menu command.	Press the underlined letter only. This is true for submenus too. For example, type **S** to select **Security**.
Select a button.	Press **CTRL** plus the underlined letter. For example, press **CTRL+E** to choose the Edit button.

Hot Keys

Some menus, such as the Help menu, are accessible using Hot Keys. These keys or key combinations correspond to a menu item. Instead of typing the underlined letter in the command, you can simply press the Hot Key. For example, to view your system configuration, press F11. Also, all date fields have a calendar dropdown, to access right click on the date.

Additional Keyboard Access

Other keys and key combinations are available in the system. They are explained below

To:	Press:
Exit the current function or window without saving the data.	**ESC**
Display the Help topic associated with the current window.	**F1**
Display the Calculator.	**F2**
Display the Calendar/Diary.	**F3**
Display the Help > About menu window.	**F9**
Display Conversion Table.	**F12**
Activate the menu bar in the Main Window.	**F10** or **ALT**
Exit the Genesis Pro system.	**ALT+F4**
Display Rounded Start and Stop times in the Online Timecard.	**R**

Help

Genesis Pro incorporates an Online Help system to answer questions about functions, procedures, and commands.

You can access context-sensitive Help from anywhere in the application by pressing the **F1** function key. You will automatically be taken to the Help topic appropriate for the screen that you are in currently.

You may also access the Online Help feature through the Help menu, from which you can perform searches and browse the Help topics. There are three ways you can look for information: Browse the Contents, Search the Index, or do a text Find. There are three tabs across the top of the Help Topics window to access each of these methods.

Access the Online Help Window

1) Click the **Help** menu**, Help**. The *Help Topics* window will open

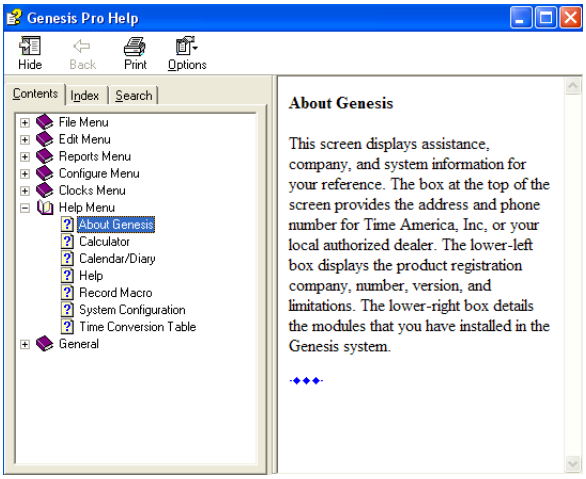


Figure 19: Help Topics

Use Help Contents

28. In the *Help Topics* window, click the *Contents* tab.
29. Double-click the topic you wish to browse. This will expand the sub-topics below it.
30. If necessary, double-click the sub-topic you wish to browse.
31. When you find the article you are interested in, double-click it to open the article.

Use the Help Index

32. In the *Help Topics* window, click the *Index* tab.
33. Type in the topic you are looking for.
34. When you find the article you are interested in, double-click it to open the article.

Use Help Find

35. In the *Help Topics* window, click the *Find* tab.
36. Type in the topic you are looking for.
37. If necessary, select a word from the list of suggestions.
38. When you find the article you are interested in, double-click it to open the article.

Return to the Help Topics Window

After reading an article, you may return to the Help Topics window by clicking the **Help Topics** button on the toolbar.

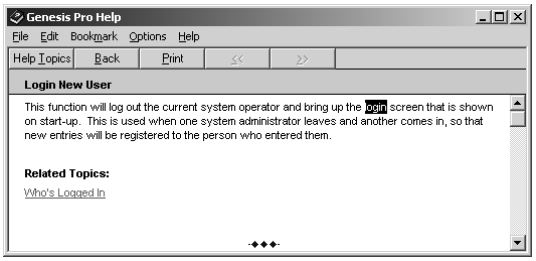


Figure 20: Help Article

Print a Help Topic

You can print any help topic by clicking the **Print** button on the toolbar.

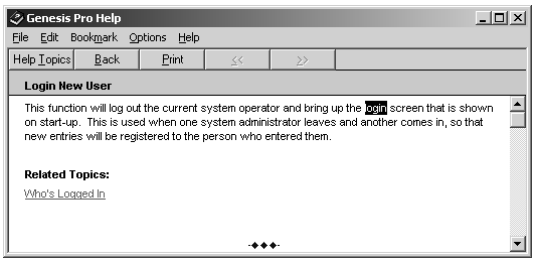


Figure 21: Help Article

39. Click the **Print** button on the Genesis Pro Help toolbar. The *Print* window will open.

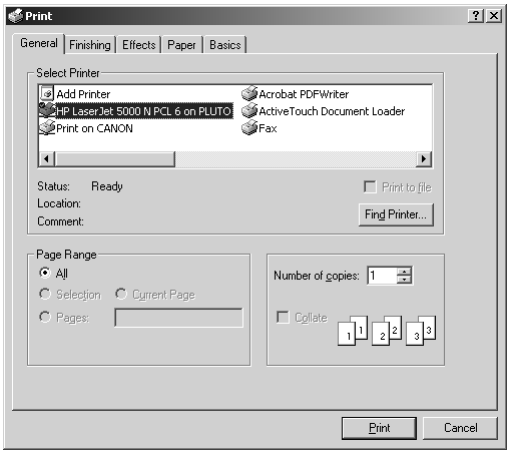


Figure 22: Print

40. Select the printer to which you wish to print and click the **Print** button. The topic will print.

Configuring the System Environment

Environmental settings control various display and functional characteristics of your system. The default settings can be modified. **Bell**, **Background** and **Large Toolbar** are available environment options. A check mark (✓) in front of the option means that the option is activated.

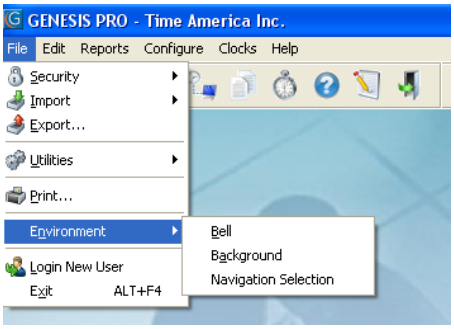


Figure 23: Environment Menu

Play Bell Tones

You can customize Genesis Pro to play a tone at the end of a field when entering data.

1. Click the **File** menu, **Environment**, **Bell**. This will cause a bell tone to play whenever you come to the end of a field when entering data.

   NOTE: To remove follow Step 1.

Change Screen Background

You can customize the Genesis Pro background to display a graphic of your choice. The graphic must be in bitmap (.bmp) format.

1. Click the **File** menu, **Environment**, **Background**. The *Select Background* window will open.

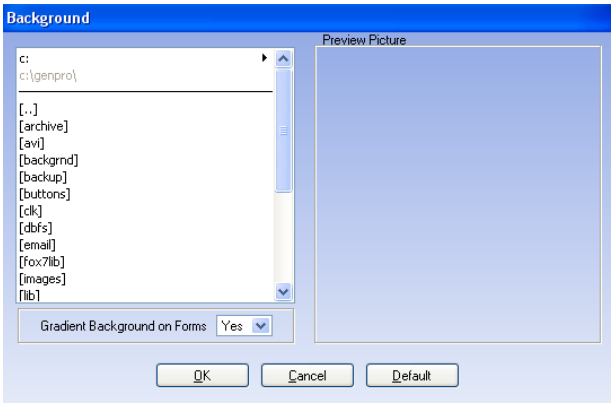


Figure 24: Select Background

2. Choose the graphics file you wish to use for your background.
   - Click the directory or file to select it.
   - Click the […] icon to go to a previous directory.
3. Click **OK** to accept the selected file.
4. Your graphic will appear on the background of Genesis Pro.

NOTE: To reset the background settings to the defaults:

- Click the **File** menu, **Environment**, **Background**. The *Select Background* window will open.
- Click the **Defaults** button.

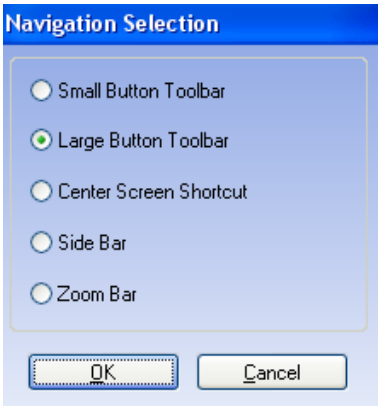
Gradient Background Option

You can activate the gradient background for all forms in Genesis Pro.

Navigation Selection

You can customize the main toolbar to display a small button toolbar, large button toolbar, show center screen shortcut, side bar or zoom bar.

1. Click the **File** menu**, Environment, Navigation Selection**. The buttons on the toolbar will enlarge.



Chapter IV Configuration

This section explains how to configure and customize Genesis Pro for your company's requirements. To make this chapter easier to follow, the topics in this section are arranged in the sequence that Time America recommends completing them. This also happens to be the order in which they appear on the Configure menu in the Genesis Pro Main Window. This order is:

- Main Company
- Divisions (optional)
- Categories
- Attendance
- Policies
- Rounding
- Shifts
- Holidays
- Groups (optional)
- Job Costing
- Security
- Bell Schedules
- Profile Lockouts
- Reasons
- Benefit Accruals

Main Company

The Main Company window is where you identify your company, define the overall configuration of the system, and specify the payroll service to which time and attendance data will be exported.

1. Click the **Configure** menu**, Company, Main Company**. The *Main Company* window will open and the *General* tab will be selected by default.

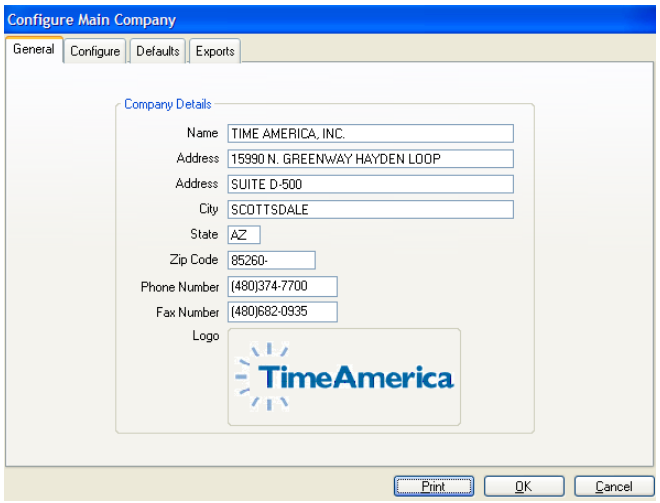


Figure 25: Main Company: General tab

2. Fill in the settings as appropriate:

Setting	Definition
Name	Enter your company's name. This field is required and can contain up to 30 characters.
Address	Enter the first line of your company's primary address. This field can accept up to 30 characters. **NOTE**: Divisions can be used to allow for additional branch addresses.
Address	Enter the second line of your company's primary address (such as suite number.) This field can accept up to 30 characters and may be left blank.
City	Enter your company's primary address City. This field can accept up to 30 characters.
State	Enter the two-character code for your company's State. Genesis Pro automatically capitalizes your entry.
Zip	Enter your company's zip code. You may enter the 5 or 9 digit zip code.
Phone Number	Enter your company's primary phone number.
Fax Number	Enter your company's primary fax number.

Logo	The company logo will appear in this window. NOTE: The bitmap file must be created and saved as companylogo.bmp. The file is located in the Genesis Pro folder. This logo can also be viewed in Reports. Locate the ReportsLogo.exe file. Run the file and then select the reports to include the logo.

3. When all settings are complete, click the *Configure* tab. The *Configure* screen will appear.

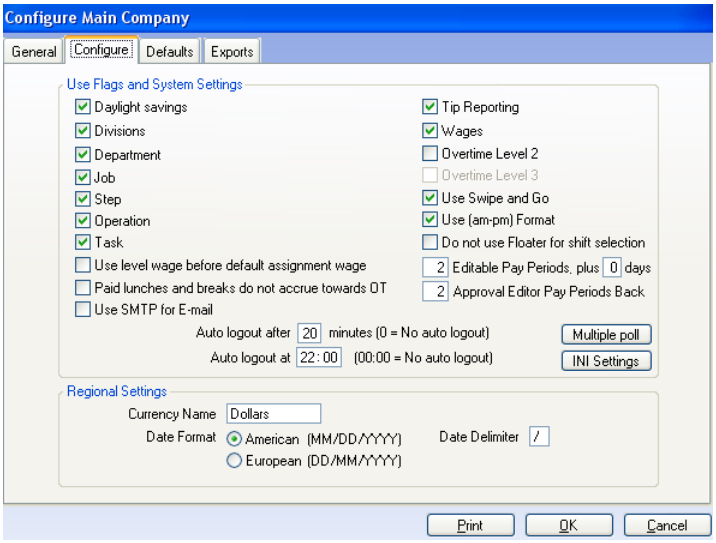


Figure 26: Main Company: Configure tab

4. Fill in the settings as appropriate

Setting	Definition
Daylight savings	Check this box if your company is in a state that observes daylight savings time. Typically you will check this box.
Divisions	Check this box to enable the Divisions feature. A Division is a "subset" of the main company, such as a branch, different location, or subsidiary company. **TIP**: Companies who submit multiple company codes to their payroll service may want to use Divisions.
Department	Check this box to enable the Departments feature. Departments reflect the business units within your company and are the top level of Job Costing. **NOTE**: You will have the opportunity to customize this nomenclature in the next screen.

Setting	Definition
Job	Check this box to enable the Job level. Jobs are the second level of Job Costing. **NOTE**: You will have the opportunity to customize this nomenclature in the next screen.
Step	This option will only be available if you have purchased the Job Costing Module. Check this box to enable the Steps level of the Job Costing feature. Steps are the third level of Job Costing. **NOTE**: You will have the opportunity to customize this nomenclature in the next screen.
Operation	This option will only be available if you have purchased the Job Costing Module. Check this box to enable the Operation level of the Job Costing feature. Operation is the fourth level of Job Costing. **NOTE**: You will have the opportunity to customize this nomenclature in the next screen.
Task	This option will only be available if you have purchased the Job Costing Module. Check this box to enable the Task level of the Job Costing feature. Task is the fifth level of Job Costing. **NOTE**: You will have the opportunity to customize this nomenclature in the next screen.
Use level wage before default assignment wage	"Level Wage" refers to the hourly rate associated with a department, job, step, operation or task. The "default assignment wage" refers to the wage associated with an individual employee. Check this box if you wish the Level Wage for the department an employee works in to take precedence over the Default Assignment Wage when calculating an employee's earnings.
Paid lunches and breaks do not accrue toward overtime	Check this box if paid lunches and breaks are not considered in calculating hours for overtime.
Tip reporting	Check this box to enable tip reporting.

Setting	Definition
Wages	Check this box to enable the wages features throughout Genesis Pro. This makes it possible to enter wage information in the Employee Maintenance screen.
Overtime Level 2	Up to three levels of overtime may be defined in Genesis Pro. One overtime level (**OT1**) is always available. To use a second overtime level (**OT2**), click the ***Overtime Level 2*** check box.
Overtime Level 3	To use a third overtime level (**OT3**) in the system, click the ***Overtime Level 3*** check box. This level is not available unless ***Overtime Level 2*** is selected.
Use Swipe and Go	Check this option to allow employees to swipe the clock without punching any keys. The system then determines whether the individual punch was an In, Out, Out for Lunch, In from Lunch, etc., based on the employee's last punch and the employee's schedule.
Use (am-pm) Format	Check this option to have reports and the online timecard use an AM/PM format instead of 24-hour format (military time.)
Do not use Floater for shift selection	Check this option to suppress all floaters from each shift group.
Editable Pay Periods, plus days	This option controls the number of pay periods and days in which it is possible to edit transactions in the Genesis Pro system. For instance, Figure 26 specifies that two pay periods of transactions can be modified.
Approval Editor Pay Periods Back	This option controls the number of pay periods in which it is possible to edit transactions from the Approval Editor.
Use SMTP for E-mail	This option allows you to define the e-mail configuration per user in security.
Multiple poll	This feature will allow you to poll multiple clocks simultaneously.
INI Settings	This option allows for custom features to be turned on.
Auto logout-minutes	This option will define the number of minutes a user can be idle in Genesis Pro before it automatically logs them out.
Auto logout-time	This option will define a specific time all users will automatically be logged out of Genesis Pro.
Currency Name	Enter the type of currency Genesis Pro should use. The default is "***Dollars***."

Setting	Definition
Date Format	Select the manner in which dates should be displayed. The options are American (MM/DD/YYYY) and European (DD/MM/YYYY).
Date Delimiter	Enter the character with which to delimit dates. The default is a slash (/).

5. When all settings are complete, click the *Defaults* tab to select it. The *Defaults* screen will appear.

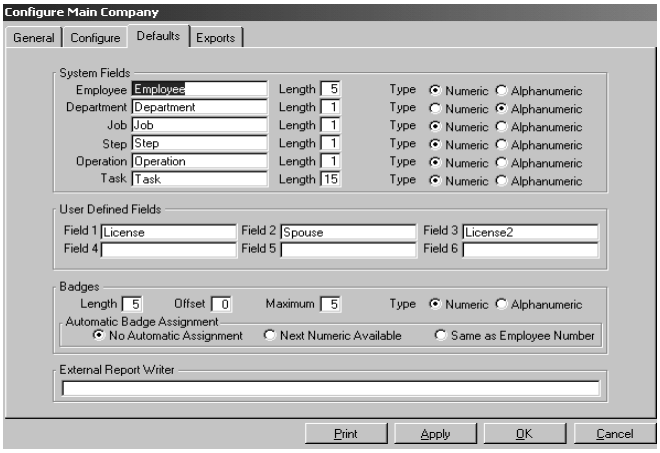


Figure 27: Main Company: Defaults Screen

6. Fill in the settings as appropriate:

Setting	Definition
Employee	Enter the term you would like to use to refer to employees. (i.e., Employees, Associates, Members, etc.) The default is "***Employees***."
Length	Enter the maximum number of digits for the Employee ID.
Type	Choose the data type for the Employee ID. The options are ***Numeric*** and ***Alphanumeric***.
Department	Enter the term you would like to use to refer to the business units within your organization. (i.e., Departments, Business Unit, Cost Center, etc.) The default is "***Department***."
Length	Enter the maximum number of digits for the Department ID.
Type	Choose the data type for the Department ID. The options are ***Numeric*** and ***Alphanumeric***.

Setting	Definition
Job	Enter the term you would like to use to refer to the second level of job costing in your organization. (i.e., Job, Project, Client, etc.) The default is "***Job***."
Length	Enter the maximum number of digits for the Job ID.
Type	Choose the data type for the Job ID. The options are ***Numeric*** and ***Alphanumeric***.
Step	Enter the term you would like to use to refer to the third level of job costing in your organization. (i.e., Job, Project, Client, etc.) The default is "***Step***." **NOTE**: This option will only appear if you have installed the Job Costing module.
Length	Enter the maximum number of digits for the Step ID.
Type	Choose the data type for the Step ID. The options are ***Numeric*** and ***Alphanumeric***.
Operation	Enter the term you would like to use to refer to the fourth level of job costing in your organization. (i.e., Job, Project, etc.) The default is "***Operation***." **NOTE**: This option will only appear if you have installed the Job Costing module.
Length	Enter the maximum number of digits for the Operation ID.
Type	Choose the data type for the Operation ID. The options are ***Numeric*** and ***Alphanumeric***.
Task	Enter the term you would like to use to refer to the fifth level of job costing in your organization. (i.e., Project, Task, etc.) The default is "***Task***." **NOTE**: This option will only appear if you have installed the Job Costing module
Length	Enter the maximum number of digits for the Task ID.
Type	Choose the data type for the Task ID. The options are ***Numeric*** and ***Alphanumeric*****.**
User Defined Fields	Genesis Pro allows you to define up to six user-defined fields. Enter the names of the fields you would like to define (if any). If you do not need any custom fields, you may leave these blank. The default values are License, Spouse, and License 2, but you may modify or delete these as desired.

Setting	Definition
Badges Length	Enter the number of characters (from 2 to 10) that will be *read from* the employee badge. For example, if the badge number is 10 characters long but you want to read only the last five characters, enter a 5 in this field. The number of digits here must match the actual number of digits on the physical badges given to employees, and must also match the settings programmed into the badge reader clocks.
Offset* **** only available when using TA620 terminals***	Enter the number of digits from the left that the clock should "offset" before reading the numbers. This tells the clock how many characters to skip before starting to read the numbers. For example, if you have a badge number that is 10 characters long (say 1234567890) and you want to read the last five numbers only (67890), the offset would be 5.
Maximum	Type the maximum number of characters (from 2 to 64) on an employee's badge. Any badge longer than this number will be rejected by the time clock.
Type	Choose the data type for the Badge number. The options are ***Numeric*** and ***Alphanumeric***. Most – though not all – badges will be Numeric.
Badge Assignment	Genesis Pro can assign badge numbers automatically when adding a new employee. You can manually change automatic assignments later if necessary. Choose ***No Automatic Assignment*** to bypass the automatic assignment and be allowed to enter the badge number manually. Choose ***Next Numeric Available*** to have Genesis Pro assign the next sequential available badge number. Choose ***Same as Employee Number*** to have Genesis Pro assign a badge number that is identical to the employee's ID number.
External Report Writer	If you will be using a third-party report editor/writer to create and/or modify Genesis Pro reports, specify the path name (drive and directory) of the report writer in this field.

7. When all settings are complete, click the *Exports* tab to select it. The *Exports* screen will appear.

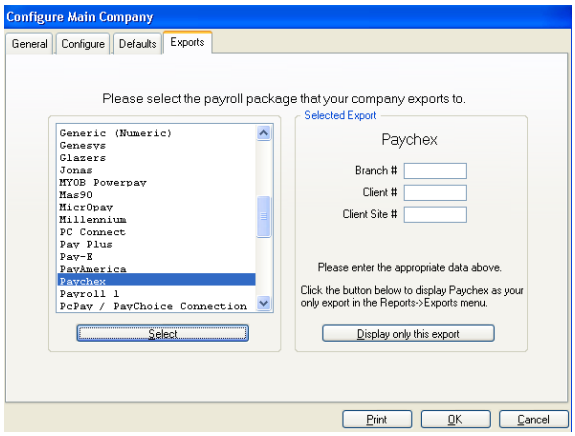


Figure 28: Main Company: Exports Tab

8. Select the payroll provider to which you wish to export data. You may be prompted for additional information specific to the payroll application selected. For example, when ADP is selected, you are asked for the ***Company Code*** of your main company. Click ***Display only this export*** to have this payroll company listed as the only export available via reports.

   NOTE: If the payroll provider you will be using does not appear in the list, simply choose either “Generic Numeric” or “Generic Alpha” depending on the Pay Code type your provider requires (contact your payroll provider to obtain this information.)

9. When all settings are complete, click **OK** to save the changes and exit the *Main Company* configuration dialog box.

Divisions

Divisions are subsets of the main company. For example, a division can be a remote office or separate business unit. Divisions are not required and will only be available if the **Divisions** option is selected in *Main Company Configure* screen.

Configure Divisions

From the divisions dialog box, you may add, edit and delete Divisions.

1. Click the **Configure** menu**, Company, Divisions**. The *Configure Divisions* dialog box will open.

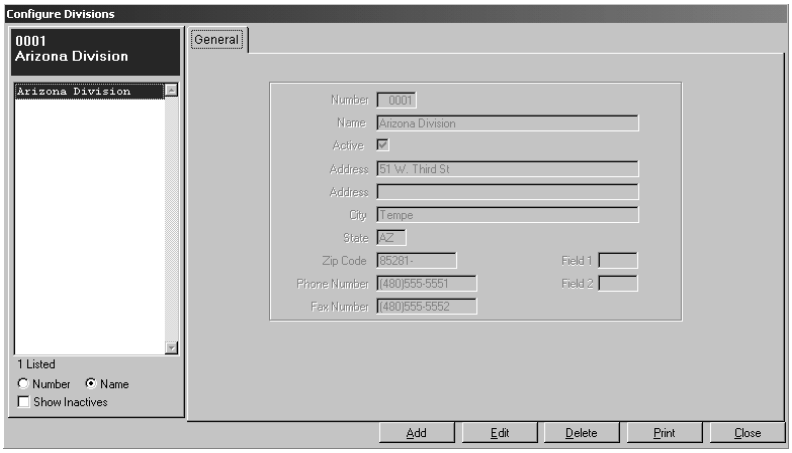


Figure 29: Divisions

2. The Divisions window includes the following information:

Setting	Definition
Number	This is a required field. Enter a 4-digit number to identify the division. **NOTE**: Do not use **0000** since this number is assigned to the main company and cannot be used for divisions.
Name	This is a required field. Type the division name (up to 30 characters) as you want it to appear in the system and on reports.
Active	Click the Active check box to indicate that the division is currently in use. Uncheck this box if the division is not being used at this time.
Address	Enter the first line address of the division. Up to 30 characters may be entered in each line.
Address	Enter the second line address of the division (if applicable). Up to 30 characters may be entered in each line.
City	Type the name of the city (up to 30 characters) for the division.

Setting	Definition
State	Type the two-character state abbreviation.
Zip	Enter the five or nine-digit postal zip code of the division.
Phone Number	Enter the telephone number for this division.
Fax Number	Enter the fax number for this division.
Additional Information	You may be prompted for additional information based upon the payroll application selected in the Export screen of the Main Company configuration. For example, if ADP is selected in the Export screen, you will be prompted for the company number of this division.

Add a Division

1. Click the **Configure** menu**, Company, Divisions**. The *Configure Divisions* dialog box will open.
2. Click the **Add** button. The *General* screen will become available for you to add the new Division.
3. Fill in the settings as described in the *Configure Divisions* section.
4. Click **OK** to commit the changes and return to the *Configure Divisions* screen.
5. Click **Close** to exit the *Configure Divisions* window.

Edit a Division

1. Click the **Configure** menu**, Company, Divisions**. The *Configure Divisions* dialog box will open.
2. Highlight the Division you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected division.
4. Edit the settings as described in the *Configure Divisions* section.
   NOTE: The Division number **cannot** be changed.
5. Click **OK** to commit the changes and return to the *Configure Divisions* screen.
6. Click **Close** to exit the *Configure Divisions* window.

Delete a Division

Divisions that are in use cannot be deleted.

1. Click the **Configure** menu**, Company, Divisions**. The *Configure Divisions* dialog box will open.
2. Highlight the division you wish to delete from the list at the side of the screen.

3. Click the **Delete** button.

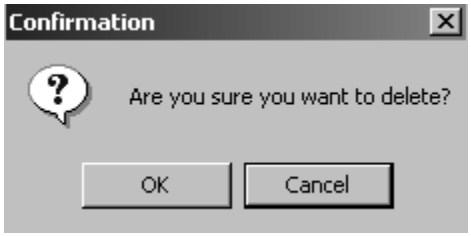


Figure 30: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Divisions* window.

Categories

Categories are used to track and report types of time or money. The built-in categories are:

- Absent
- Adjustment
- Break
- Bereavement
- Holiday
- Jury Duty
- Lunch
- Military Leave
- Sick – NonPaid
- Other Paid Time
- Personal Day
- Per Diem #1
- Per Diem #2
- Sick – Paid
- Cash Tips
- Charge Tips
- Banquet Tips
- Other Tips
- Vacation
- Worked Time

You may edit and delete built-in categories (other than Work), as well as add custom categories specific to your organization, such as Floating Holidays, Family Leave, etc.

Categories are used in entering time and monetary adjustments for employees.

Configure Categories

1. Click the **Configure** menu**, Categories**. The *Configure Categories* dialog box will open.

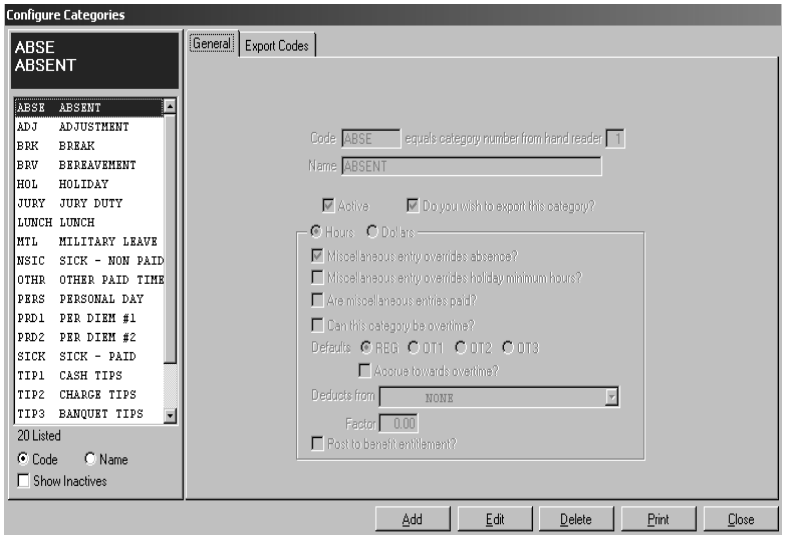


Figure 31: Categories

2. The *Configure Categories* screen displays the following information:

Setting	Definition
Code	This is a required field. Enter a code (up to 4 alphanumeric characters) to identify the category. Once saved, this code cannot be changed.
Equals category number from hand reader.	When entering a Category into a Hand Reader, only a numerical value can be entered. Use this field to assign a number representing the Category Code.
Name	This is a required field. Enter the category name, as it will appear in the system and on reports. The category name can be up to 30 characters long.
Active	Click the Active check box to indicate that the category is currently in use. Clear this check box if the category is not being used at this time.
Do you wish to export this category?	This indicates whether this category will be included in the export information created for your payroll service. If this option is selected, the *Export* tab will become available. You must configure the *Export* tab settings to specify field mappings for your payroll export. (See Step 3.)
Hours/Dollars	This is a required field. Select either ***Hours*** or ***Dollars*** to indicate the category type. For example, the category VACATION collects hour amounts, while the categories TIP1 and TIP2 collect dollar amounts. If ***Hours*** is selected, complete the remaining fields that apply. If ***Dollars*** is selected, the remaining fields in this dialog box are unavailable.

Setting	Definition
Miscellaneous entry overrides absence?	Select this option to allow a Miscellaneous entry of this category to override an absence. (Miscellaneous refers to an entry other than Work.)
Miscellaneous entry overrides holiday minimum hours?	Allows time in this category to count toward the minimum hours worked requirement for allocating paid holiday time. (Miscellaneous refers to an entry other than Work.)
Are miscellaneous entries paid?	Allows time in this category to be treated as "paid time." Select this option if employees will be paid when receiving a miscellaneous entry using this category. (Miscellaneous refers to an entry other than Work.)
Can this category be overtime?	This option will only be available if miscellaneous entries are paid. Select this option to accrue time in this category towards overtime. Clearing this option causes the system to prohibit overtime calculation on this category. If the category can be overtime, it is also possible to default to a specific level as well as enable it to accumulate towards overtime.
Defaults	Determines to which pay factor this category should default. The options are ***Regular***, ***OT1***, ***OT2***, and ***OT3***.
Deducts from	Enables you to select a benefit entitlement "bucket" from which to deduct time posted to this category. For example, you might have a category called Family Illness that deducts from the Sick time entitlement. This enables you to itemize the specific type of time taken, while still tracking the time against a generic entitlement. This option is mutually exclusive with the Post to benefit entitlement (which causes the category to become its own benefit entitlement entry.)
Factor	This setting works with the ***Deducts from*** setting. Enter the factor at which this category's time should be deducted. (i.e., a factor of 1 would indicate that for every one hour worked, one hour would be deducted. A factor of 2 would indicate that for every one hour worked, two hours would be deducted.)
Post to benefit entitlement?	Select this option to post accrued time in this category to company benefits. Checking this option makes it possible to configure benefit entitlement and/or rules for this pay type. Also, any time posted to this category will be deducted from the available entitlement for this category.

3. The *Export Codes* tab will be available only if the ***Do you wish you to export this category*** option is checked.

   NOTE: These settings will be used to map data collected by Genesis Pro to

the appropriate fields in your payroll application, and it is critical that they be configured fully and accurately. The information in these fields must be obtained from the payroll service specified in *Company Setup*. Contact your payroll service representative or software manual for the information requested, if necessary.

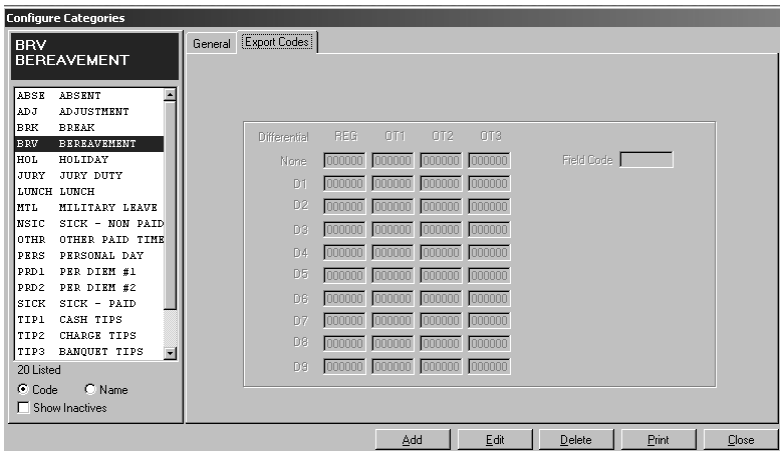


Figure 32: Export Codes tab

4. The *Export Codes* tab includes the following information:

Setting	Definition
Differential: None	This line of information will specify the codes for hours that do not have differential adjustments.
Differential: D1-D9	These lines of information will specify the codes used by hours allocated to each Shift Differential.
REG	Regular Hours are hours paid at "straight time." Enter the code your payroll application uses to refer to Regular hours.
OT1	OT1 hours are hours paid at the factor defined for OT1 in the Payroll Policy. Enter the code your payroll application uses to refer to hours paid at the OT1 factor.
OT2	OT2 hours are hours paid at the factor defined for OT2 in the Payroll Policy. Enter the code your payroll application uses to refer to hours paid at the OT2 factor. **NOTE**: This option will only appear if OT2 has been selected on the *Configure* tab of the *Main Company* configuration dialog box.
OT3	OT3 hours are hours paid at the factor defined for OT3 in the Payroll Policy. Enter the code your payroll application uses to refer to hours paid at the OT3 factor. **NOTE**: This option will only appear if OT3 has been selected on the *Configure* tab of the *Main Company* configuration dialog box.

Setting	Definition
Field Code	Enter the code that indicates which field of your payroll software this category will be mapped to. This code differentiates between categories of time that use the same field number. For example, regular (REG) hours for VACATION and HOLIDAY may both use field number 16. By assigning a field code V to the VACATION category and H to the HOLIDAY category, vacation hours are reported in field 16V, while holiday hours are reported in 16H. If no field code was assigned, you could not differentiate between vacation and holiday hours.

Add a Category

1. Click the **Configure** menu**, Categories**. The *Configure Categories* dialog box will open.
2. Click the **Add** button to add a new Category. The *General* tab will become available.

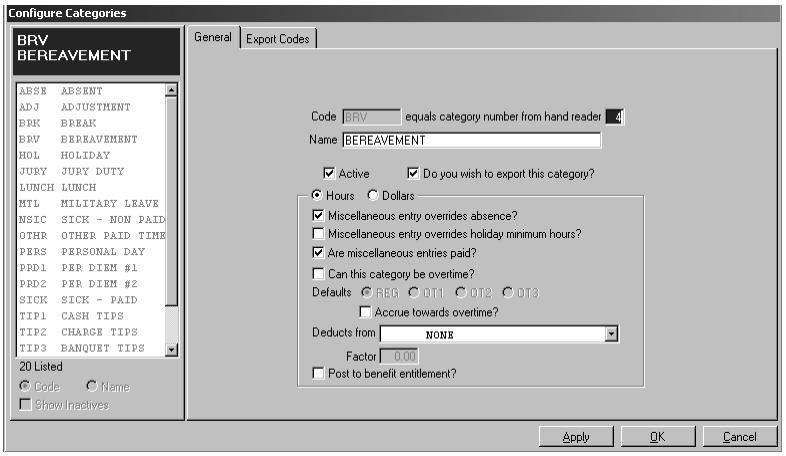


Figure 33: Adding a new Category

3. Fill in the settings as described in the *Configure Categories* section.
4. Click **OK** to commit the changes and close the *Categories* dialog box.
5. Click **Close** to exit the *Configure Categories* window.

Edit a Category

1. Click the **Configure** menu**, Categories**. The *Configure Categories* dialog box will open.
2. Highlight the Category you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected category.
4. Edit the settings as described in the *Configure Categories* section.
5. Click **OK** to commit the changes and return to the *Configure Categories* screen.
6. Click **Close** to exit the *Configure Categories* window.

Delete a Category

Categories that are in use cannot be deleted.

1. Click the **Configure** menu, **Categories**. The *Configure Categories* dialog box will open.
2. Highlight the category you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 34: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Categories* window.

Attendance Codes

Attendance codes are used to indicate time rounding and employee attendance on reports. These codes are used in conjunction with the Rounding Rules. (See ***Rounding Rules***, page 65.) Some examples of attendance codes are:

- In Late (IL)
- In Early (IE)
- Break Long
- Lunch Short
- Out Early

Configure Attendance Codes

1. Click the **Configure** menu**, Attendance**. The *Configure Attendance* dialog box will open.

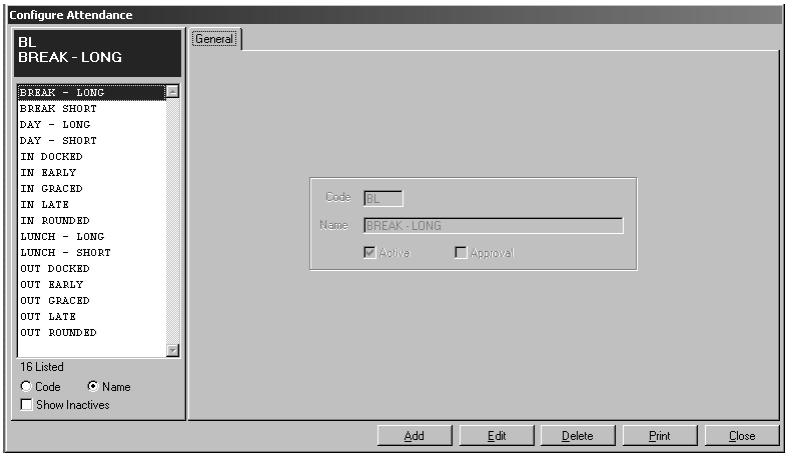


Figure 35: Configure Attendance

2. The *Configure Attendance* dialog box contains the following information:

Setting	Definition
Code	This field is required. Enter a user-defined attendance code up to 5 alphanumeric characters in length. Once saved, this code cannot be changed.
Name	This field is required. Type the attendance code name as you want it to appear in the system and on reports. The attendance description can be up to 30 characters long.

Setting	Definition
Active	Click the Active check box to indicate an active attendance code. Clear this check box if the code is inactive. Rather than deleting an attendance code from the system, simply mark it inactive in the event you wish to use it again at a later date.
Approval	Check this box to cause attendance infractions marked with this Attendance code to appear in the *Approval Editor*. (The *Approval Editor* permits a supervisor to review and process attendance infractions prior to producing time and attendance reports. For more information on the *Approval Editor*, see page 266.)

Add an Attendance Code

1. Click the **Configure** menu**, Attendance**. The *Configure Attendance* dialog box will open.
2. Click the **Add** button. The *General* screen will become available for you to add the new Attendance Code.

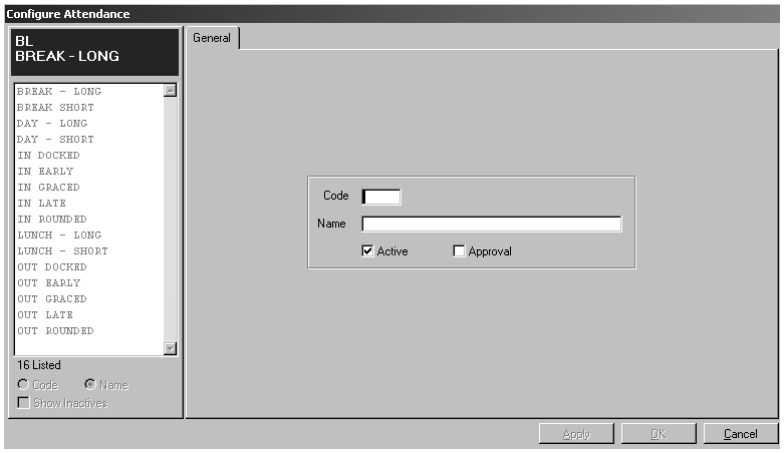


Figure 36: Add an Attendance Code

3. Fill in the settings as described in the *Configure Attendance Codes* section.
4. Click **OK** to commit the changes and return to the *Configure Attendance* screen.
5. Click **Close** to exit the *Configure Attendance* window.

Edit an Attendance Code

1. Click the **Configure** menu**, Attendance**. The *Configure Attendance* dialog box will open.
2. Highlight the Attendance code you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected code.

4. Edit the settings as described in the *Configure Attendance Codes* section.
5. Click **OK** to commit the changes and return to the *Configure Attendance* screen.
6. Click **Close** to exit the *Configure Attendance* window.

Delete an Attendance Code

Attendance Codes that are in use cannot be deleted.

1. Click the **Configure** menu**, Attendance**. The *Configure Attendance* dialog box will open.
2. Highlight the Attendance code you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 37: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Attendance* window.

Policies

Policies are used to store and apply the business or payroll rules governing overtime, holidays, etc. It is possible to have more than one set of rules within an organization, so Genesis Pro makes it possible to create many Policies. Each employee is assigned to the Policy that applies for him or her.

Configure Policies

1. Click the **Configure** menu**, Policies**. The *Configure Policies* dialog box will open.

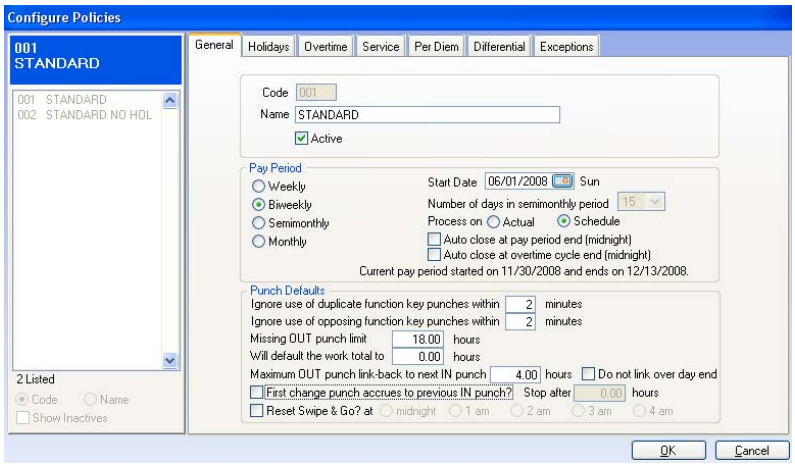


Figure 38: Configure Policies

2. There are several tabs in the *Configure Policies* dialog box, each with its own settings. The first tab, *General* tab defines general payroll policy parameters and contains the following information:

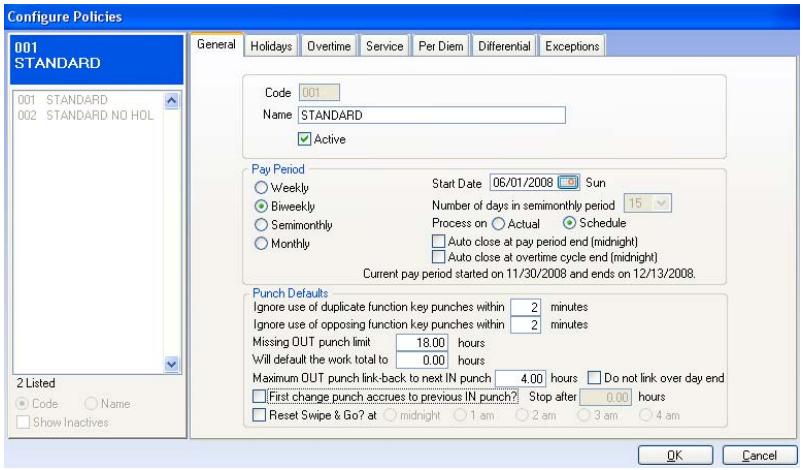


Figure 39: Policies: General tab

Setting	Definition
Code	This field is required. Enter a code (up to 3 alphanumeric characters) to identify the policy. Once saved, this code cannot be changed.
Name	This field is required. Type the company policy name, as it will appear in the system and on reports. The policy name can be up to 30 characters long.
Active	Click the Active check box to indicate that the policy is currently in use. Clear this check box if the policy is not being used at this time.
Pay Period	Select the appropriate pay period information for your company.
Weekly	Check this option if wages are paid weekly.
Bi-weekly	Check this option if wages are paid every other week.
Semimonthly	Check this option if wages are paid twice a month.
Monthly	Check this option if wages are paid once a month.
Start Date	Enter the starting date of the pay period (using MM/DD/YYYY format). This is used for calculations and represents the starting date of an entire payroll period. The day of the week (Sunday, Monday, etc.) that corresponds to the starting date is used to determine when the cycle begins. **NOTE:** This date should be the first of a month in the past that corresponds to the day of the week that the pay period starts on.
Number of Days in semimonthly period	If the pay period is semimonthly, specify the number of days in the first half of the policy's semi-monthly period. Click the down arrow next to the entry field to select a number from 1 to 28.
Process on	Indicates how the employee's time (for lunches, breaks, time rounding, etc.) is processed for this policy. The options are Actual and Schedule. Typically you will choose Schedule. **Actual:** Time is processed under the shift rules in effect when the employee actually punched In. **Schedule:** Time is processed under the rules of the employee's scheduled shift.

Setting	Definition
Punch Defaults	The settings in this section define how punches are processed.
Auto close at pay period end (midnight)	Select this option to have over midnight hours split between two pay periods.
Auto close at overtime cycle end (midnight)	Select this option to have over midnight hours split between two overtime cycles.
Ignore use of duplicate function key punches within	Enter the number of minutes (up to 59) during which duplicate punches on the time clock are ignored. When duplicate punches are made within this time frame, only the *last punch* is used for calculations.
Ignore use of opposing function key punches within	Enter the number of minutes (up to 59) in which opposing (i.e. sequential In/Out) punches on the time clock are ignored. For example, if 3 minutes is entered here and an employee accidentally punches Out instead of In, the employee can enter the In punch within 3 minutes to correct the error and Genesis Pro will ignore the Out punch entirely.
Missing Out punch limit	Enter the number of hours (in HH.MM format) that can pass after the In punch before the system assumes the employee has forgotten to punch out and flags the time and attendance reports. For example, if 10.00 is entered in this field, the system expects an Out punch to be recorded no later than 10 hours after the shift's In punch. The default for this field is 18.00 or 18 hours.
Will default the Work total to	Enter the time (in HH.MM format) to be recorded when the employee is flagged with a Missing Out Punch. For example, assume an employee is scheduled to work 8 hours and forgets to punch Out. If 8.00 is entered in this field, the system recognizes the missing Out punch yet totals 8 hours for the employee. The default for this field is 00.00 (indicating that no time will be totaled for a Missing Out Punch).

Setting	Definition
Maximum Out punch link back to In punch	Enter the maximum time an employee who has punched Out can punch back In and still have the new time included in the previous total when calculating daily overtime. For example, assume that the **Maximum Out Punch Link-Back** is defined as 2.00 and overtime is paid after working 8 hours in a single day. If an employee punches In at 8:00 A.M. and Out at 5:00 P.M. (with a one hour unpaid lunch) then punches back In at 6:30 P.M. (within the 2-hour link-back) and Out again at 9:30 P.M., the daily total shows 8 hours of regular time and 3 hours of overtime.
Do not link over day end	Check this option if the out punch link back should stop at the end of the day.
First Change Punch accrues to In punch	Check this option if the first department and/or job transfer after the In punch should be retroactive to the In punch.
Stops After	Enter the number hours you want the above rule to be effective.
Reset Swipe & Go	This option allows you to accept either 12a, 1a, 2a, 3a or 4a as a reset time.

3. The *Holidays* tab defines the rules for paying Holidays and contains the following information:

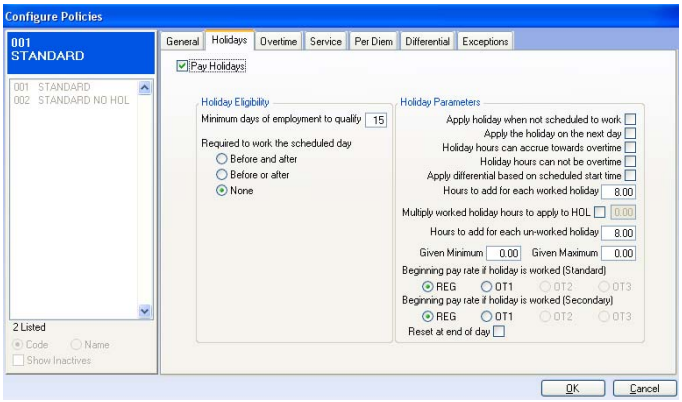


Figure 40: Policies: Holidays tab

Setting	Definition
Pay Holidays	Check this option if you wish the program to pay holidays. You will specify the dates of the holidays in a separate dialog box. (See ***Holidays***, page 83.)
Holiday Eligibility	These settings define the prerequisites for being paid for the holiday.

Setting	Definition
Minimum days of employment to qualify	Enter the minimum number of days (up to 3 digits) from the hire date for an employee to qualify for non-worked holiday pay. The default is 90 meaning 90 qualifying days are required.
Required to work the scheduled day	Select an option to indicate which days the employee must work to qualify for holiday pay. **Before *and* After.** Employee must work the scheduled day before and after the holiday to receive holiday pay. **Before *or* After.** Employee must work the scheduled day before or after the holiday to receive holiday pay. **None.** There are no requirements for the employee to qualify for holiday pay.
Minimum before	Enter the number of hours that must be worked on the day prior to the holiday in order for that day to qualify as having been worked.
Minimum after	Enter the number of hours that must be worked on the day after the holiday in order for that day to qualify as having been worked.
Holiday Parameters	These settings define how the Holiday pay will be allocated.
Apply Holiday when not scheduled to work	Check this option if the holiday hours can be given to an employee who is not scheduled to work on the holiday.
Apply the Holiday on the next day	Check this option if you want overnight shift's holiday hours to apply the next day. This will apply to ***ALL*** holidays entered into the system. **Example:** An employee's punch is processed on the out. And the holiday is July 4th. They would come in on July 3rd at 11:00 and clock out July 4th
Holiday hours can accrue toward overtime	Check this option if holiday hours and added holiday time count toward overtime. For example, assume an employee works 44 hours during a week and one 8-hour holiday occurs. If this option is checked, and overtime is paid after 40 hours, the employee receives 40 hours regular pay and 12 hours overtime. If this option is *not* checked, the employee receives 48 hours regular pay and 4 hours overtime.

Setting	Definition
Holiday hours can not be overtime	Check this option if given holiday hours will never be overtime.
Apply differential based on scheduled start time	Check this option if the employee should receive differential for holiday pay not worked.
Hours to add for each worked holiday	Enter the number of hours (in HH.MM format) to be added to the employee's time for each *worked* holiday. These hours are in addition to actual time worked. For example, if 8.00 hours are entered in this field, and an employee works 8 holiday hours, 8 more hours are added to the employee's time. The default is 8.00.
Given Minimum	Enter the minimum number of hours that an employee is guaranteed to receive for holiday pay, regardless of the number of hours worked.
Given Maximum	Enter the maximum number of hours that an employee is guaranteed to receive for holiday pay, regardless of the number of hours worked.
Multiply worked holiday hours to apply to HOL	Click this check box to multiply any worked holiday hours by a specified rate.
Hours to add for each unworked holiday	Enter the number of hours (in HH.MM format) added to the employee's time for each *non-worked* holiday. This entry is usually equal to the number of regular hours worked. The default is 8.00.
Beginning pay rate if Holiday is worked (Standard)	Select a level to indicate the employee's wage multiplier for a Standard worked holiday. **Reg**. Regular wages are paid for a worked holiday. **OT1**. The overtime rate specified in OT1 on the Overtime dialog box is paid for a worked holiday. **OT2**. The overtime rate specified in OT2 on the Overtime dialog box is paid for a worked holiday. **OT3**. The overtime rate specified in OT3 on the Overtime dialog box is paid for a worked holiday.

Setting	Definition
Beginning pay rate if Holiday is worked (Secondary)	Select a level to indicate the employee's wage multiplier for a secondary worked holiday. **Reg**. Regular wages are paid for a worked holiday. **OT1**. The overtime rate specified in OT1 on the Overtime dialog box is paid for a worked holiday. **OT2**. The overtime rate specified in OT2 on the Overtime dialog box is paid for a worked holiday. **OT3**. The overtime rate specified in OT3 on the Overtime dialog box is paid for a worked holiday.
Reset at end of day	Check this option to disable the holiday pay rate at midnight. Clear this check box to continue using the holiday pay rate specified until the employee punches Out.

4. The *Overtime* tab defines the rules for calculating overtime and contains the following information:

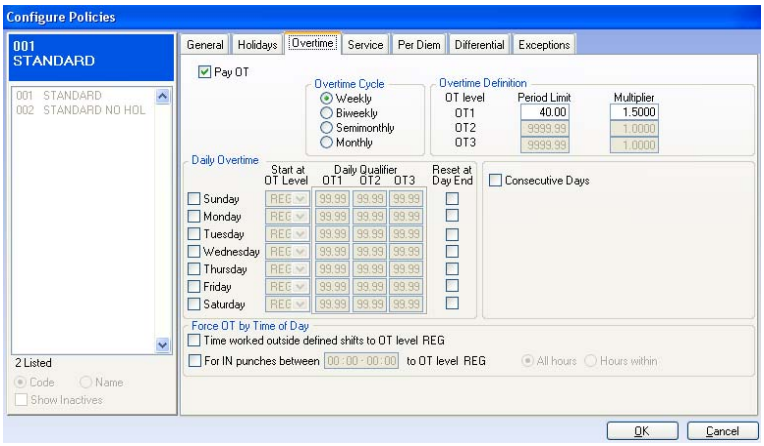


Figure 41: Policies: Overtime tab

Setting	Definition
Pay OT	Check this option to pay overtime to employees using this Policy.

Setting	Definition
Overtime Cycle	This field is required. Enter the pay period that you use to calculate overtime. For example, if overtime is paid after 40 hours of work per week, select the Weekly option. This Overtime Cycle is independent of the Pay Period specified in Policy Maintenance but must not be greater than the policy pay period. For example, if the policy Pay Period is Biweekly, you may select an Overtime Cycle of Weekly or Biweekly, but not Semimonthly or Monthly since these cycles are longer than the policy pay period. **Weekly**. Overtime is calculated weekly. **Biweekly**. Overtime is calculated every two weeks. **Semimonthly**. Overtime is calculated twice a month. **Monthly**. Overtime is calculated once a month.
Overtime Definition	These settings define when and how overtime is calculated. **TIP:** Begin by entering your first level of overtime in OT1.If after 40 hours of work per week, you pay time-and-a-half, enter 40.00 in the Period Limit field and 1.5000 in the Multiplier field. If double-time is paid after 60 hours, enter 60.00 in the Period Limit field and 2.0000 in the Multiplier field for OT2. On Sundays and holidays, you may want to pay double-time and one-half regardless of hours worked. In this case, enter 99.99 in the Period Limit field and 2.5000 in the Multiplier field for OT3.
OT Level	Up to three levels of overtime (**OT1**, **OT2** and **OT3**) may be defined per policy.
Period Limit	Enter the number of hours (in HH.MM format) that an employee must work to be eligible for overtime. For example, in a weekly pay period, the ***Period Limit*** is typically defined as 40.00; in a biweekly period, it is normally defined as 80.00.
Multiplier	Enter the multiplication factor used to compute overtime pay. The normal pay rate is multiplied by this number. For example, to pay time-and-a-half, enter 1.50; to pay double-time, enter 2.00.

Setting	Definition
Daily Overtime	These settings allow paying daily overtime. For example, many companies pay daily overtime over eight hours per day. Another example is paying double overtime on Sundays, regardless of how many hours are worked in the overtime cycle.
Day of the Week	Select the day(s) of the week that are paid daily overtime by checking the appropriate checkbox.
Start at OT Level	Select the applicable overtime level to be paid (if any) at the start of the day. Choose ***Regular*** if no overtime is paid (regular wages), or ***OT1, OT2*** or ***OT3*** to pay the overtime wages defined above.
Daily Qualifier	Under ***OT1, OT2*** and ***OT3***, enter the number of daily hours (in HH.MM format) that must be worked before that overtime level will be acknowledged by the system. For example, if Sunday hours start at OT1, and OT2 begins after 8 hours, enter 8.00 in Sunday's OT2 Daily Qualifier. Only overtime levels above the entry in ***Start at OT Level*** are available.
Reset at Day End	Check this box to force any overtime hours that roll into the next day (after midnight) to be processed using the next day's rules. Clear the check box to process hours accumulated past midnight using the OT rate from the previous day.
Consecutive Days	Check this box if overtime is paid automatically after working a certain number of consecutive days. **NOTE:** Additional options appear when this box is checked.
Num of Days	Enter the number of consecutive days that must be worked before overtime starts.
Minimum Daily	Enter the minimum number of daily hours that must be worked on each consecutive days to qualify for overtime.
Hours Total	Enter the minimum number of total hours that must be worked for all of the consecutive days to qualify for overtime.
OT Level	Select the overtime level that applies when the consecutive days criteria is met.

Setting	Definition
On Days that Qualify	Check this box to pay a second Overtime Level if an employee works more than the specified amount in the ***After*** field. Genesis Pro will apply the settings in the ***After*** and ***Overtime Level*** fields once the employee qualifies for consecutive day overtime.
After (hrs)	Enter the number of hours after which the second OT level will apply on days qualifying for consecutive day overtime. For example, if the employee gets OT1 for the first eight hours, and OT2 after eight hours worked on the seventh consecutive day, you would enter 8 in this field, and OT2 in the next field.
OT Level	Select the second OT level Genesis Pro will pay when an employee meets the qualification for the ***After*** field under "On days that qualify". This setting works in conjunction with the ***After*** column and indicates what overtime level will be paid when the number of hours in the ***After*** field has been met.
Reset Overtime at Cycle End	If checked, this option tells Genesis Pro to reset the Consecutive Days count after the Overtime Cycle ends. This is used for Pay Periods with more days than the Overtime Cycle.
Force OT by Time of Day	These settings allow you to force OT to be calculated for hours worked during specific times of day, regardless of the total number hours worked.
Time worked outside defined shifts to OT level XX	Check this option to cause any hours outside of the employee's scheduled work hours to be paid at the specified overtime level. A drop-down box from which to choose the desired OT level will become available. Select the OT level for time worked outside the employee's schedule. This option is only available if process on schedule is chosen on the *General* tab of the *Configure Policy* dialog box.

Setting	Definition
In punches between XX and XX to OT level REG	Check this option to cause any hours between the specified times to be paid at the specified overtime level. A drop-down box from which to choose the desired OT level will become available. Select the OT level for OT paid during these hours. You must also choose whether ***All Hours*** or ***Hours Between*** are eligible for the OT If ***All Hours*** is selected, all the hours for the shift whose In punch falls in the range specified above will be paid at the specified OT level. If ***Hours Between*** is selected, only the hours that fall in the specified range will be paid at OT.

5. The *Service* tab defines In and Out on Service parameters and contains the following information:

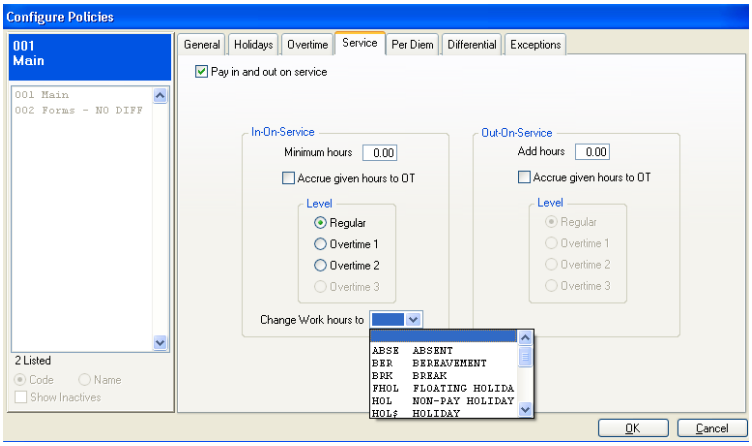


Figure 42: Policies: Service tab

Setting	Definition
Pay in and out on service	Check this box to enable In and Out on service.
In on Service	***In On Service*** gives the employee a minimum number of hours regardless of how long the employee works. For example, an employee who is on call might get paid for 2 hours of time for coming in for an emergency, even though he/she only worked for 15 minutes.
Minimum Hours	Enter the minimum number of hours (HH.MM) the employee is paid to come in on service. The default is **0.00**.
Accrue given hours to OT	Check this box if the in on service hours (***Minimum Hours***) count toward overtime.

Setting	Definition
Level	If ***Accrue Given Hrs to OT*** is selected, choose the level of overtime to be paid while in on service.
Change Work hours to	Choose the category to be assigned to the **In On Service** hours.
Out on Service	***Out On Service*** allows the program to pay an additional number of hours for company business accomplished after the employee clocks out. For example, an employee might clock out for the day and then travel to a client location. The employee would be paid for the time traveling as Out on Service.
Minimum Hours	Enter the number of hours (HH.MM) added to the employee's time to go out on service. The default is 0.00 or no hours added.
Accrue given hours to OT	Check this box if the out on service hours above (***Add Hours***) count toward overtime.
Level	If ***Accrue Given Hrs to OT*** is selected, choose the level of overtime to be paid for out on service.

6. The *Per Diem* tab defines daily hour and/or pay adjustments and contains the following information:

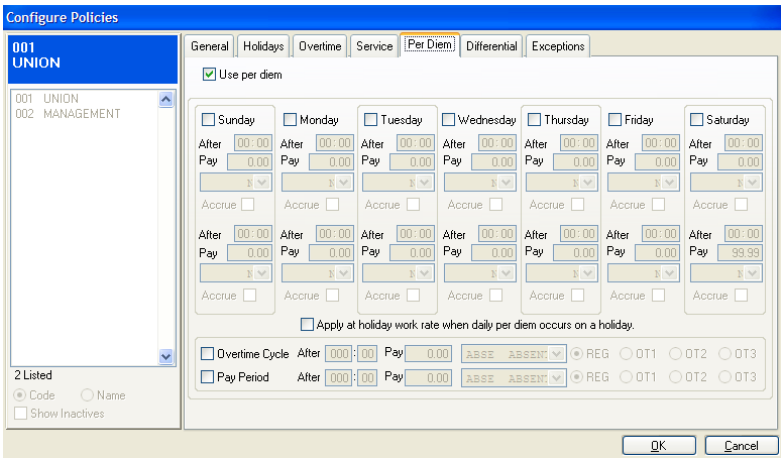


Figure 43: Policies: Per Diem tab

Setting	Definition
Use per diem	Check this option to grant the employee per diem benefits. These benefits can be additional paid hours or additional monetary amounts. You may give up to two per diems per day.

Setting	Definition
Day of week	Check the box for each day on which you wish to pay a Per Diem. The per diem will be paid after the employee has worked the hours indicated in the ***After*** box. Leave the check box empty if you do not wish to pay a per diem on that day.
After	Enter the number of hours the employee must work in order to qualify for the per diem. You may leave it set to 0 to cause the per diem to be paid regardless of how many hours the employee works. The maximum value for this field is 23:59. **NOTE:** There are two settings for each day of the week.
Pay	This setting can be hours or money, depending upon the category chosen. If choosing a time category, enter the number of hours. If choosing a dollar category, enter the dollar amount to be given. **NOTE:** There are two settings for each day of the week.
Category	Select the category for the per diem.
Accrue	Check this box to have the hours accrue towards overtime. This option only applies if the category selected is a paid time category.
Apply at Holiday work rate when daily per diem occurs on a holiday	Check this box if per diem being paid on a Holiday should follow Holiday work rate.
Overtime Cycle	Check this box to have an extra hourly or monetary amount granted to an employee for certain hours worked in an overtime cycle. This could be used to pay a productivity bonus for people who work lots of hours. **NOTE**: This is separate from overtime.
After	Enter the number of hours the employee must work in the overtime cycle or pay period in order to qualify for the per diem.
Pay	Enter the number of hours to be paid for the per diem.
Category	Select the category for the per diem.
OT Level	Select the OT level at which the hours for the per diem should be given.

Setting	Definition
Pay Period	Check this box to have an extra hourly or monetary amount granted to employee for certain hours worked in a pay period. This could be used to pay a productivity bonus for people who work lots of hours. **NOTE**: This is separate from and in addition to overtime.
After	Enter the number of hours the employee must work in the overtime cycle or pay period in order to qualify for the per diem.
Pay	Enter the number of hours to be paid for the per diem.
Category	Select the category for the per diem.
OT Level	Select the OT level at which the hours for the per diem should be given.

7. The *Differential* tab defines the codes and rates for up to nine levels of Shift Differentials. A Shift Differential is a premium amount or factor paid in addition to the employee's regular wage for certain hours worked during the day. Shift Differentials work in conjunction with Shifts. The *Differential* tab contains the following information:

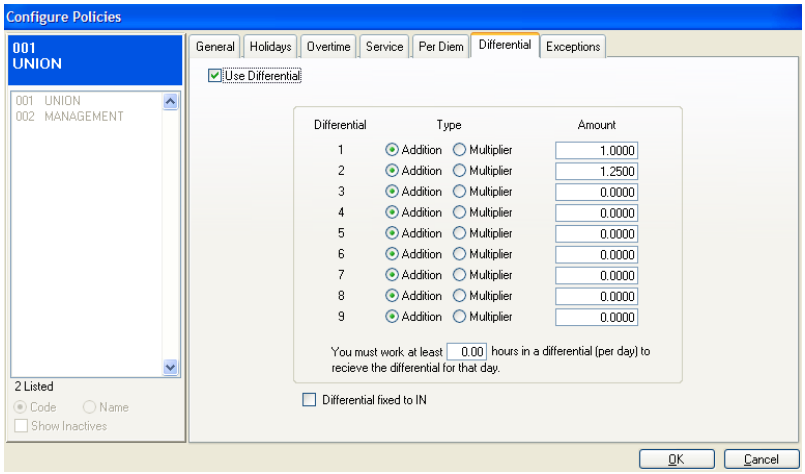


Figure 44: Policies: Differential tab

Setting	Definition
Use Differential	Check this option to enable the shift differentials.
Differential	There are nine differential codes available.

Setting	Definition
Type	Select the type of differential. **Addition**. Select this option to add a specific dollar amount to the employee's regular wage. **Multiplier**. Select this option to multiply the employee's regular wage by a multiplication factor.
Amount	Enter the amount of the differential. If the type is ***Addition***, enter the amount in dollars and cents that should be paid above the employee's regular wage for differential hours (i.e. .30 for 30 cents per hour). If the type is ***Multiplier***, enter the percentage or factor to multiply the employee's regular wage for differential hours (i.e. 1.5 for time and a half).
You must work at least…	Enter the minimum amount of hours an employee must work before the differential is activated.
Differential fixed to In	Check this option to pay an employee a differential premium only when he/she punches *In* within the time frame(s) specified in Shift Maintenance. Clear this check box to pay an employee a differential premium if *any part of the hours* falls within the time frame(s) in Shift Maintenance.

8. The *Exceptions* tab defines rules for flagging hours worked exceptions and contains the following information:

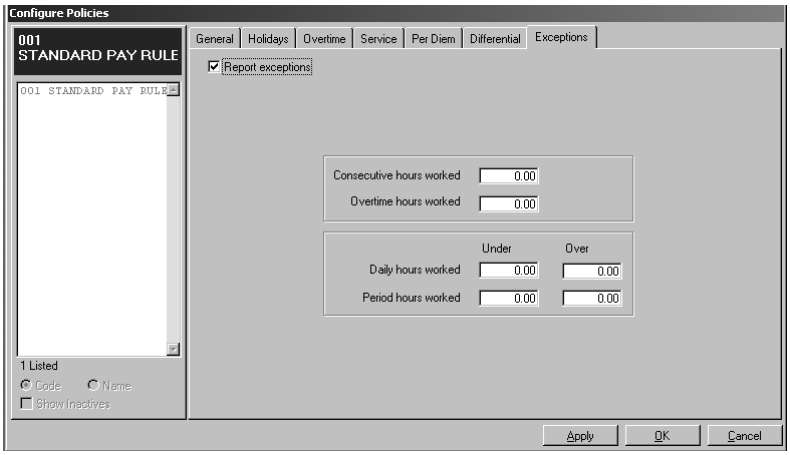


Figure 45: Policies: Exceptions tab

Setting	Definition
Report Exceptions	Check this box for Genesis Pro to report employees that work above or below the specified parameters.

Setting	Definition
Consecutive hours worked	Enter the number of consecutive hours worked (HH.MM) that, if exceeded by an employee, will be reported on the Consecutive Hours Exception report. For example, if 14.00 is entered, employees working over 14 consecutive hours are flagged for the report.
Overtime hours worked	Enter the number of overtime hours (HH.MM) that, if exceeded by an employee, will be reported on the Overtime Hours Exception report. For example, if 20.00 is entered, any employees working over 20 hours of overtime are flagged for the report.
Daily hours worked	An employee who works ***under*** or ***over*** this number of hours (HH.MM) per day is reported on the Daily Hours Exception report. For example, if 6.00 is entered in the **Under** or **Over** fields, an employee working **under** or **over** 12 hours a day is flagged for the report.
Period hours worked	An employee who works ***under*** or ***over*** this number of hours (HH.MM) per day is reported on the Period Hours Exception report. For example, if 30.00 is entered in the **Under** or **Over** fields, an employee working **under** or **over** 60.00 hours in a pay period is flagged for the report.

Add a Policy

1. Click the **Configure** menu**, Policies**. The *Configure Policies* dialog box will open.
2. Click the **Add** button to add a new Policy. The *Default Policy Add* dialog box will become available.

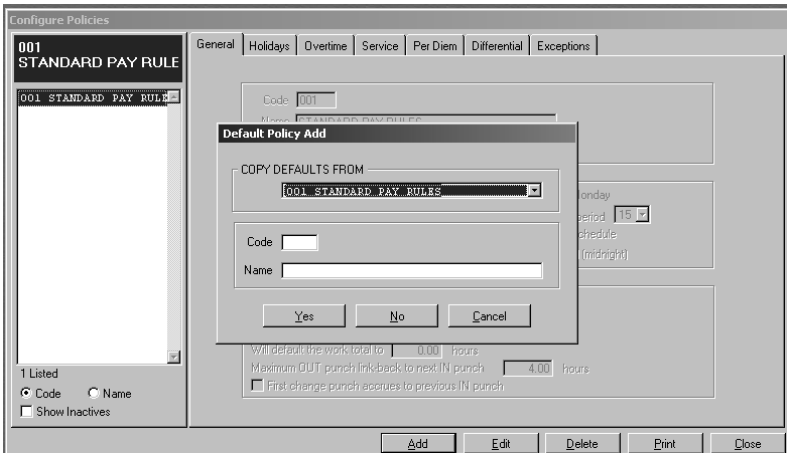


Figure 46: Adding a new Policy

3. Enter a unique code for this policy.

4. Enter a unique name for this policy.
5. Click **Yes** to copy the existing policy, or click **No** to start from scratch.
6. Fill in the settings as described in the *Configure Policies* section.
7. Click **OK** to commit the changes and close the General dialog box.
8. Click **Close** to exit the *Configure Policies* dialog box.

Edit a Policy

1. Click the **Configure** menu**, Policies**. The *Configure Policies* dialog box will open.
2. Highlight the Policy you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Policy.
4. Edit the settings as described in the *Configure Policies* section.
5. Click **OK** to commit the changes and return to the *Configure Policies* screen.
6. Click **Close** to exit the *Configure Policies* dialog box.

Delete a Policy

1. Click the **Configure** menu**, Policy**. The *Configure Policies* dialog box will open.
2. Highlight the Policy you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 47: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Policies* dialog box.

Rounding

Rounding is used to round punches backwards or forwards according specific rules. Rounding codes can also be used to round the total duration of a work period. Genesis Pro can round In, Out, Lunch and Break punches, and can have different rules for each. The rounding rules defined in this dialog box will be tied to Shifts in a separate dialog box.

As part of the Rounding configuration, you will specify which kind of transaction the rounding applies to: In/Out, Lunch or Break. Several Rounding Rules are built in to Genesis Pro:

- Break 15 Minutes
- Break Minute to Minute
- In/Out Minute to Minute
- In/Out Shift Duration
- In/Out Standard Rounding
- Lunch 30 Minutes
- Lunch 60 Minutes
- Lunch Minute to Minute

Configure Rounding Rules

1. Click the **Configure** menu**, Rounding**. The *Configure Rounding* dialog box will open.

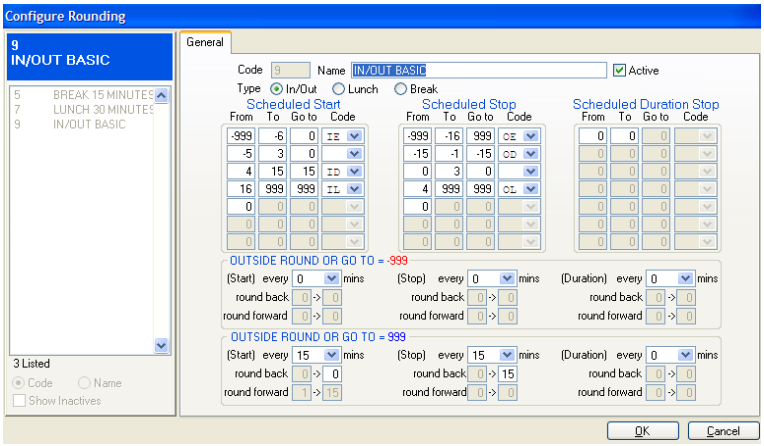


Figure 48: Rounding

2. The *Configure Rounding* dialog box contains the following information:

Setting	Definition
Code	This field is required. Enter a unique rounding code up to 5 characters in length. Once saved, this code cannot be changed.
Name	This field is required. Type the time rounding code name as you want it to appear in the system and on reports. The rounding code name can be up to 30 characters long.

Setting	Definition
Active	Click the Active check box to indicate an active rounding code. Clear this check box if the code is inactive. Rather than deleting a rounding code from the system, simply mark it inactive in the event you wish to use it again at a later date.
Type	Select the type of transaction to be rounded. Available selections are ***In/Out*** (In or Out punch), ***Lunch*** and ***Break***.
Scheduled Start	These settings define the rounding rules for the period's start time. Depending upon the type of transaction selected, this may be the In, Start Lunch or Start Break punch.
From	Identifies the number of minutes that are rounded before the scheduled start time. Scheduled time is considered 0. A negative number is the number of minutes before the period's start time. A positive number is the number of minutes after the period's start time.
To	Identifies the number of minutes that are rounded before the scheduled start time. Scheduled time is considered 0. A negative number is the number of minutes before the period's start time. A positive number is the number of minutes after the period's start time.
Go to	Indicates the rounding time (in minutes from the scheduled time) for punches that occur between the ***From*** and ***To*** entries. Enter 999 to use the settings in the ***Outside Round or Go To = 999*** box. Enter 0 to round the time to the scheduled start time.
Code	Select an attendance code to be applied to the time transaction. (The attendance codes were predefined in the *Attendance*, page 45, dialog box.)
Scheduled Stop	These settings define the rounding rules for the period's end time. Depending upon the type of transaction selected, this may be the Out, End Lunch or End Break punch.

Setting	Definition
From	Identifies the number of minutes that are rounded before the scheduled stop time. Scheduled time is considered 0. A negative number is the number of minutes before the period's stop time. A positive number is the number of minutes after the period's stop time.
To	Identifies the number of minutes that are rounded before the scheduled stop time. Scheduled time is considered 0. A negative number is the number of minutes before the period's stop time. A positive number is the number of minutes after the period's stop time.
Go to	Indicates the rounding time (in minutes from the scheduled time) for punches that occur between the ***From*** and ***To*** entries. Enter 999 to use the settings in the ***Outside Round or Go To = 999*** box. Enter 0 to round the time to the scheduled stop time.
Code	Select an attendance code to be applied to the time transaction. (The attendance codes were predefined in the *Attendance,* page 45, dialog box.)
Scheduled Duration Stop	These settings define rounding rules to round the duration of the work period (as opposed to the start or end time.)
From	Identifies the number of minutes that are rounded before the scheduled duration time. The end of the duration is considered to be 0. A negative number is the number of minutes before the period's duration time. A positive number is the number of minutes after the period's duration time.
To	Identifies the number of minutes that are rounded before the scheduled duration time. The end of the duration is considered to be 0. A negative number is the number of minutes before the period's duration time. A positive number is the number of minutes after the period's duration time.

Setting	Definition
Go to	Indicates the rounding time (in minutes from the scheduled time) for punches that occur between the ***From*** and ***To*** entries. Enter 999 to use the settings in the ***Outside Round or Go To = 999*** box. Enter 0 to round the time to the scheduled duration time
Code	Select an attendance code to be applied to the time transaction. (The attendance codes were predefined in the *Attendance,* page 45, dialog box.)
Outside Round or Go to -999 and 999	Since it is impractical to enter all instances of time rounding in the ***Scheduled Start***, ***Scheduled Stop*** and ***Scheduled Duration*** boxes, the ***Outside Round (2)*** boxes are for additional rounding rules not covered in the ranges above. Each rounding category (***Start,*** ***Stop*** and ***Duration***) has its own set of outside rounding parameters. In addition, if **-999 or 999** is entered in the ***Go to*** field, the rounding rules in this box apply.
Start	These settings refer to In, Start Lunch or Start Break punches.
Every XX mins	Rounding may be minute to minute (0) or in set increments of 3, 6, 15, 30 or 60 minutes. Click the arrow to display valid entries then select the increment desired. For example, entering 15 in this field means that for punches occurring outside the ***Scheduled Start*** time, round to the nearest 15 minutes using the ***Round Back*** and ***Round Forward*** rules specified below.
Round back	This range indicates the period of time (in minutes) during which the clock rounds *back* to the last increment. You need only enter the last minute of this range. The first minute is always 0**.**
Round forward	This range indicates the period of time (in minutes) during which the clock rounds *forward* to the next increment. These fields are automatically calculated by the system based on the rounding increment specified in the round back field.
Stop	These settings refer to Out, End Lunch or End Break punches.

Setting	Definition
Every XX mins	Rounding may be minute to minute (0) or in set increments of 3, 6, 15, 30 or 60 minutes. Click the arrow to display valid entries then select the increment desired. For example, entering 15 in this field means that for punches occurring outside the ***Scheduled Start*** time, round to the nearest 15 minutes using the ***Round Back*** and ***Round Forward*** rules specified below.
Round back	This range indicates the period of time (in minutes) during which the clock rounds *back* to the last increment. You need only enter the last minute of this range. The first minute is always 0**.**
Round forward	This range indicates the period of time (in minutes) during which the clock rounds *forward* to the next increment. These fields are automatically calculated by the system based on the rounding increment specified in the round back field.
Duration	These settings refer to work period durations.
Every XX mins	Rounding may be minute to minute (0) or in set increments of 3, 6, 15, 30 or 60 minutes. Click the arrow to display valid entries then select the increment desired. For example, entering 15 in this field means that for punches occurring outside the ***Scheduled Start*** time, round to the nearest 15 minutes using the ***Round Back*** and ***Round Forward*** rules specified below.
Round back	This range indicates the period of time (in minutes) during which the clock rounds *back* to the last increment. You need only enter the last minute of this range. The first minute is always 0**.**
Round forward	This range indicates the period of time (in minutes) during which the clock rounds *forward* to the next increment. These fields are automatically calculated by the system based on the rounding increment specified in the round back field.

Add a Rounding Rule

1. Click the **Configure** menu**, Rounding**. The *Configure Rounding* dialog box will open.
2. Click the **Add** button to add a new Rounding rule. The *General* tab will become available.

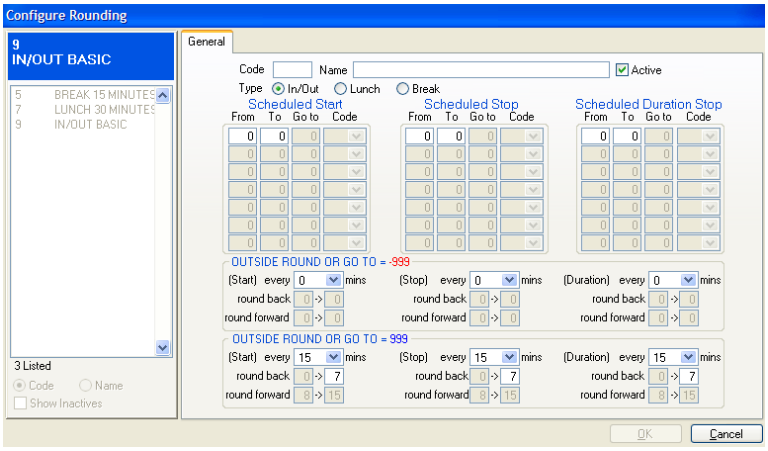


Figure 49: Adding a new Rounding rule

3. Fill in the settings as described in the *Configure Rounding* section.
4. Click **OK** to commit the changes and close the *Rounding* dialog box.
5. Click **Close** to exit the *Configure Rounding* dialog box.

Edit a Rounding Rule

1. Click the **Configure** menu**, Rounding**. The *Configure Rounding* dialog box will open.
2. Highlight the Rounding rule you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Rounding Rule.
4. Edit the settings as described in the *Configure Rounding* section.
5. Click **OK** to commit the changes and return to the *Configure Rounding* screen.
6. Click **Close** to exit the *Configure Rounding* dialog box.

Delete a Rounding Rule

1. Click the **Configure** menu**, Rounding**. The *Configure Rounding* dialog box will open.
2. Highlight the Rounding rule you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 50: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Rounding* dialog box.

Shifts

Shifts define the work schedule for your employees. Shifts are created in **Shift Groups**, which can include multiple **Shifts**. For example, you may have a Shift Group for the Day-Shift workers, in which unique Shifts may start at 7am, 8am, and 9am. Rounding rules are applied to the Shift Group to determine employee tardiness and rounding.

An employee assigned to a Shift Group can be assigned to any of the individual shifts within it. The employee may also "float" between Shifts, which causes Genesis Pro to determine tardiness and rounding according to the Shift the employee punched in closest to. For example, an employee that clocks in at 7:45am would be considered to be on the 8am Shift that day, simply because he/she clocked in closer to 8am than to 7am. The parameters for this "cut off" are defined as part of the Shift.

You will first create the Shift Group (Days, Swing, Graveyard, etc.) and then will create the unique Shifts within it.

Configure a Shift Group

A Shift Group is made up of individual Shifts that are unique but are related in some way. For example, the Day Shift Group has Shifts that all take place during daylight hours, but has unique starting & stopping times (7am-4pm, 8am-5pm, 9am-6pm, etc.)

1. Click the **Configure** menu**, Shifts**. The *Configure Shifts* dialog box will open. The *Configure Shifts* dialog box contains three tabs, which are described below.

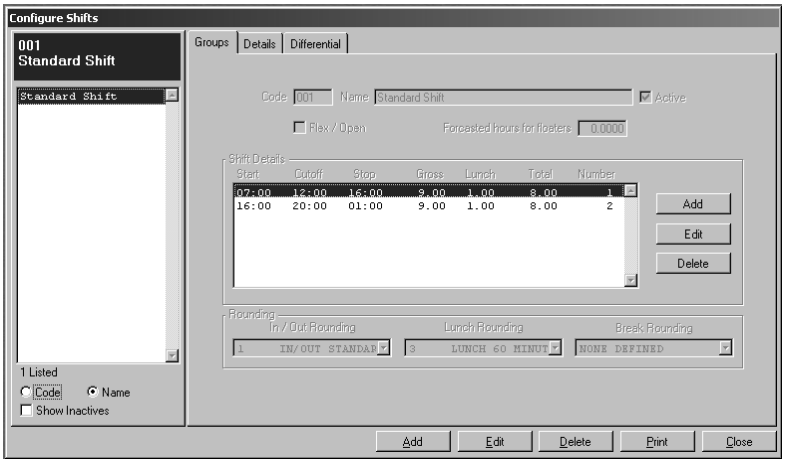


Figure 51: Shifts

2. The *Shift Groups* tab defines the settings that apply to the Shift Group as a whole and contains the following information:

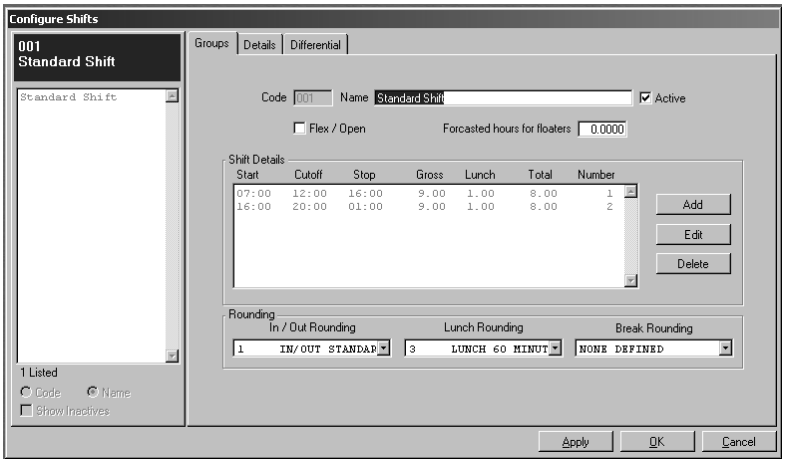


Figure 52:Shifts: Shift Groups tab

Setting	Definition
Code	This field is required. Enter a unique shift code up to 3 characters in length. Once saved, this code cannot be changed.
Name	This field is required. Type the shift group name, as you want it to appear in the system and on reports. The shift group name can be up to 30 characters long.
Active	Click the Active check box to indicate an active shift group. Clear this check box if the group is inactive. Rather than deleting a shift group from the system, simply mark it inactive in the event you wish to use it again at a later date.
Flex/Open	Click the Flex/Open check box if the shift group consists of flexible shifts. A flexible shift does not have a designated start and stop time. It only specifies the number of hours that an employee must work to complete the shift. When ***Flex/Open*** is selected, you cannot set the start and stop times for any individual shift created in this group. You can only specify the total duration of the shift. Also, the ***Forecasted hours for floaters*** is unavailable.
Forecasted hours for floaters	Enter the number of hours that a floating employee must work within a pay period. This allows the system to forecast a number of hours for floating employees when doing forecast reporting. Unlike an employee assigned to a fixed shift, a floating employee may work varied shifts as long as he/she works the total number of hours required for the pay period.

Setting	Definition
Shift Details	Displays the individual shifts that comprise the shift group. Each row in the box is an individual shift. If the ***Shift Details*** box is blank, no individual shifts have been created for this group.
Add/Edit/Delete buttons	These buttons allow you to maintain the Shifts within this Shift Group.
Rounding	These settings determine which Rounding Rules will apply to all the Shifts within this Shift Group.
In/Out	Click the arrow to select time rounding rules for In and Out punches used by the shift ***group***. **NOTE:** These rules apply to the entire group and not to the individual shifts.
Lunch	Click the arrow to select time rounding rules for Lunch punches used by the shift ***group***. **NOTE:** These rules apply to the entire group and not to the individual shifts.
Break	Click the arrow to select time rounding rules for Break punches used by the shift ***group***. **NOTE:** These rules apply to the entire group and not to the individual shifts.

3. The *Details* tab is only available when you are adding or editing a Shift (as opposed to the Shift Group). It defines the settings for a selected Shift within the Shift Group, and contains the following information:

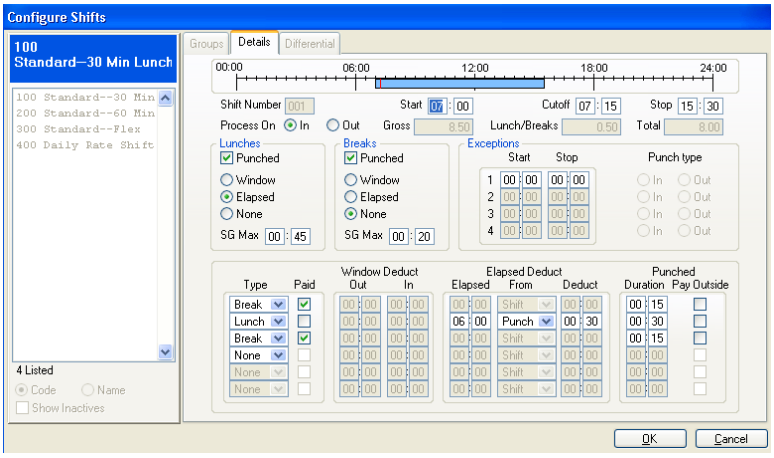


Figure 53:Shifts: Shift Details tab

Setting	Definition
Graphic	Use the graphic timeline to define the individual start and stop time of a shift.
Shift Number	Enter a unique number (up to 3 digits) to identify the individual shift.
Start	Type the individual shift's starting time in HH:MM. Times must be entered in military format.
Cutoff	Type the individual shift's latest starting time (cutoff) in HH:MM, before the individual would "float" into the next schedule. Times must be entered in military format. Cutoff times may overlap with other start times in the same shift group.
Stop	Type the individual shift's ending time in HH:MM. Times must be entered in military format.
Process On	If the shift's stop time rolls over to a new day, do you want to process the hours on the day the employee punched In or punched Out? Select the ***In*** *or* ***Out*** option by clicking the desired field.
Gross	This field automatically displays the total duration of the shift from clock in to clock out.
Lunch/Breaks	This field automatically displays the total number duration of lunches and breaks (combined).
Totals	This field automatically displays the total paid hours for the day. It takes into account whether or not breaks and lunches are paid.
Lunches	These settings define how lunches are treated during this shift.
Punched	Check this box to indicate that employees should clock out for and in from lunch.

Setting	Definition
Window	Select this option if the shift's lunch period must be taken within a specified window of time. For example, an employee's lunch period is from 12:00 P.M. to 1:00 P.M. If the Punched check box is not selected, this period is deducted automatically (if lunch is unpaid). If the Punched check box is selected, the employee must punch Out for and In from lunch within this time period. If the employee punches Out at 11:30 A.M. and punches In at 12:30 P.M., 1½ hours is counted as lunch. If the employee punches Out at 12:30 P.M. and punches In at 1:00 P.M., one hour is counted as lunch even though only ½ hour was taken. Define the time frame in the ***Window Deduct*** box below.
Elapsed	Select this option if the shift's lunch period is automatically deducted after a number of elapsed hours. If the ***Punched*** check box is also selected, the punched time overrides the elapsed time. In other words, if the employee does not punch Out for and In from lunch, the shift's lunch period is automatically deducted after the elapsed time. Define the elapsed time in the ***Elapsed Deduct*** box below.
None	If no restrictions apply to the shifts lunch period, select this option. Typically, if the employee has a paid lunch, clear the ***Punched*** check box and select ***None***. This prohibits the employee's lunch period from being deducted from the shift's total hours.
SG Max	If Swipe and Go is in use, this tells Genesis Pro what the maximum amount of time a lunch or break can be. Enter time in military format. Genesis Pro will then take all the punches and measure the duration between transactions. If the duration is longer than the SG Max, it will move to the next option.
Breaks	These settings define how breaks are treated during this shift.
Punched	Check this box to indicate that employees should clock to and from break.

Setting	Definition
Window	Select this option if the shift's break must be taken within a specified *window* of time. For example, an employee's break is from 10:00 A.M. to 10:30 A.M. If the **Punched** check box is not selected, this period is deducted automatically (if the break is unpaid). If the **Punched** check box is *selected*, the employee must punch Out for and In from break within this time period. If the employee punches Out at 9:45 A.M. and punches In at 10:15 A.M., 45 minutes is counted as break. If the employee punches Out at 10:15 A.M. and punches In at 10:30 A.M., ½ hour is counted as break even though only 15 minutes was taken. Define the time frame in the ***Window Deduct*** box below.
Elapsed	Select this option if the shift's break period is automatically deducted after a number of elapsed hours. If the ***Punched*** check box is also selected, the punched time overrides the elapsed time. In other words, if the employee does not punch Out for and In from break, the shift's break period is automatically deducted after the elapsed time. Define the elapsed time in the ***Elapsed Deduct*** box below.
None	If no restrictions apply to the shift's break, select this option. Typically, if the employee has a paid break, clear the ***Punched*** check box and select ***None***. This prohibits the employee's break from being deducted from the shift's total hours.
SG Max	If Swipe and Go is in use, this tells Genesis Pro what the maximum amount of time a lunch or break can be. Enter time in military format. Genesis Pro will then take all the punches and measure the duration between transactions. If the duration is longer than the SG Max, it will move to the next option.
Exceptions	Enter the time frames for exception transactions in this box. These are the time frames in which employees are not supposed to be punching. If a punch falls within these time frames, it is reported on the Punch Interval Exceptions report and to the Approval Editor as an exception or violation that needs supervisor approval.
Start	Type the starting time of the exception in HH:MM. Time must be entered in military format.

Setting	Definition
Stop	Type the ending time of the exception in HH:MM. Time must be entered in military format.
Punch Type	Select ***In*** or ***Out*** to indicate that the exception applies to an In or Out punch.
Type	Click the down arrow to the right of the ***Type*** field and select the type of period (**Lunch**, **Break** or **None**) to be defined in this row. For example, to define a windowed lunch period, select **Lunch** as the **Type**.
Paid	For windowed lunches or breaks, if the lunch or break is paid, select the ***Paid*** check box. Otherwise, clear this box to indicate an unpaid lunch or break.
Window Deduct	These settings define the parameters for Window Lunches and Breaks. If ***Window*** is selected in either the ***Lunch*** or ***Breaks*** sections, you must configure this section. Select the type of entry you are defining (Lunch or Break) and enter the times for the Out and In punches.
Out/In	Enter the starting and ending times of the lunch period or break in the ***Out*** and ***In*** fields. Time must be entered in HH:MM in military format.
Elapsed Deduct	These settings define the parameters for Elapsed Lunches and Breaks. If Elapsed is selected in either the Lunch or Breaks sections, you must configure this section.
Elapsed	Enter the number of hours that need to elapse before a Lunch or Break is automatically deducted. For example, if three hours must elapse, enter 03:00 in this field.
From	Click the button to the left of the ***From*** field and select whether the elapsed time starts from the ***Actual In Punch*** or ***Shift Start Time***. The word Punch or Shift displays in this field to indicate your selection.
Deduct	Enter the time to be automatically deducted for the Lunch or Break. For example, to deduct one hour, enter 01:00.
Punched	These settings define how long the employee is allowed for lunch, and how payment should be handled if the employee takes more time than is allowed.

Setting	Definition
Duration	If the employee punches Out for and In from lunches or breaks, enter the duration of the lunch or break in this field. For example, to specify a one-hour lunch period, enter 01:00.
Pay Outside	If the employee punches Out for and In from lunch, select the ***Pay Outside*** check box to authorize payment for any time taken outside the specified window of time.

4. The *Differential* tab defines a Shift Differential for this Shift Group (not for the individual Shift) and contains the following information:

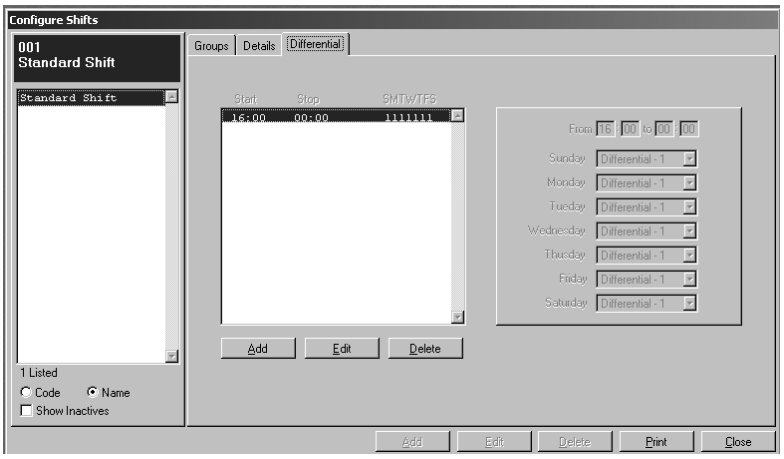


Figure 54:Shifts: Differential tab

Setting	Definition
Differential List	Displays the Start, Stop, and daily status of an existing differential.
From	Select the starting time for the pay differential.
To	Select the ending time for the pay differential.
Day of the Week	Select the differential premium code (D1-D9) assigned to the shift each day of the week. For example, a 10:00 P.M. to 6:00 A.M. shift may receive a $5.00 per hour premium on weekends, but only $2.50 per hour premium Monday through Friday. If no differential premium code applies to a particular day, select "No Differential".

Add a Shift Group

1. Click the **Configure** menu**, Shift**. The *Configure Shift* dialog box will open.
2. Click the **Add** button to add a new Shift Group. The *Groups* tab will become available.

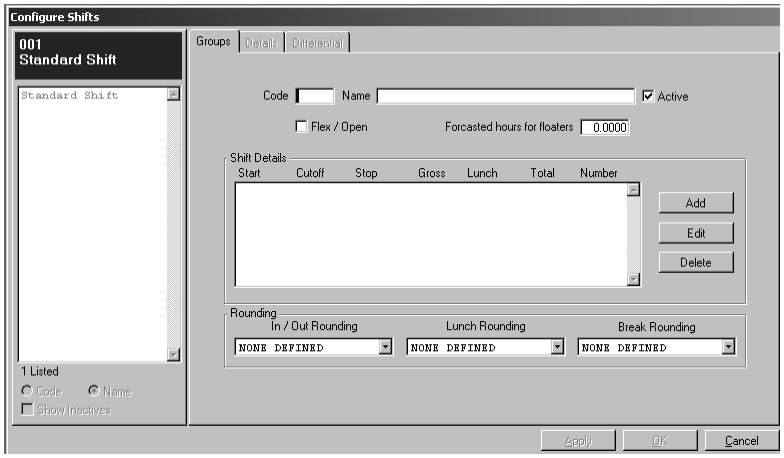


Figure 55: Adding a new Shift Group

3. Fill in the Code, Name, Flex/Open, Forecasted hours for Floaters and select the Rounding as describe in the *Configure Shift Group* section.
4. Click **OK** to commit the changes and close the *Configure Shift Group* dialog box.
5. Click **Close** to exit the *Configure Shift Group* dialog box.

   NOTE: See Add A Shift to enter the specific shifts within this shift group.

Edit a Shift Group

1. Click the **Configure** menu**, Shift**. The *Configure Shift Group* dialog box will open.
2. Highlight the Shift Group you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *Groups* screen will become available for you to edit the selected Shift Group.
4. Edit the Name, Flex/Open, Forecasted hours for Floaters and select the Rounding as describe in the *Configure Shift Group* section.
5. Click **OK** to commit the changes and return to the *Configure Shift Group* screen.
6. Click **Close** to exit the *Configure Shift Group* dialog box.

   NOTE: See Edit a Shift to edit shift within this shift group.

Delete a Shift Group

1. Click the **Configure** menu**, Shift**. The *Configure Shift Group* dialog box will open.
2. Highlight the Shift Group you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 56: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Shift Group* dialog box.

Add a Shift

1. Click the **Configure** menu**, Shift**. The *Configure Shift* dialog box will open.
2. Click the **Add** button next to the Shift Details window to add a new Shift. The *Details* tab will become available.
3. Fill in the settings as described in the *Configure Shift* section.
4. Click **OK** to commit the changes and close the Shift dialog box.
5. Click on the *Differential* tab to add a shift differential.
6. Click the **Add** button.
7. Enter the From and To in HH:MM.
8. Select the Day and Differential number that will apply to this shift.
9. Click **Close** to exit the *Configure Shift* dialog box.

Edit a Shift

1. Click the **Configure** menu**, Shift**. The *Configure Shift* dialog box will open.
2. Highlight the Shift you wish to edit from the list in the center of the *Groups* screen.
3. Click the **Edit** button next to the Shift Details window. The *Details* screen will become available for you to edit the selected Shift.
4. Edit the settings as described in the *Configure Shift* section.
5. Click **OK** to commit the changes and return to the *Configure Shift* screen.
6. Click on the *Differential* tab to edit a shift differential.
7. Click the **Edit** button.

8. Edit the From, To, Day and Differential number.
9. Click **OK** to commit the changes and close the *Shift Differential* dialog box.
10. Click **Close** to exit the *Configure Shift* dialog box.

Delete a Shift

1. Click the **Configure** menu**, Shift**. The *Configure Shift* dialog box will open.
2. Highlight the Shift you wish to from the list in the Center of the *Groups* screen.
3. Click the **Delete** button next to the Shift Details window. You will be prompted:

Figure 57: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Shift* dialog box.

Holidays

The Holiday feature specifies which dates are considered company holidays. (*How* employees are paid for the holidays is defined within **Policies** section.) Holidays must be defined in order to post employee time toward a paid holiday rather than time worked, as well as to generate time and attendance reports that reflect holidays.

It is necessary to define the holidays each year, as certain holidays fall on or are observed on different dates each year.

Holiday Tips:

- It is not necessary to define all annual holidays: only enter those holidays that your company recognizes.
- If a holiday falls on a Sunday, but your employees get Monday off, enter the holiday using Monday's date.
- If a holiday falls on a weekend, and your employees do not receive holiday hours for that day, then don't enter the holiday in the system.
- If your employees get two consecutive days off for a holiday, you must enter both dates. For example, if Tuesday is the holiday and you wish to give both Monday and Tuesday off with pay; enter the date for both days.

NOTE: No more than two ***consecutive*** holidays may be entered if employees must work the day before *and* the day after the holiday.

Configure Holidays

1. Click the **Configure** menu**, Holidays**. The *Configure Holidays* window will open.

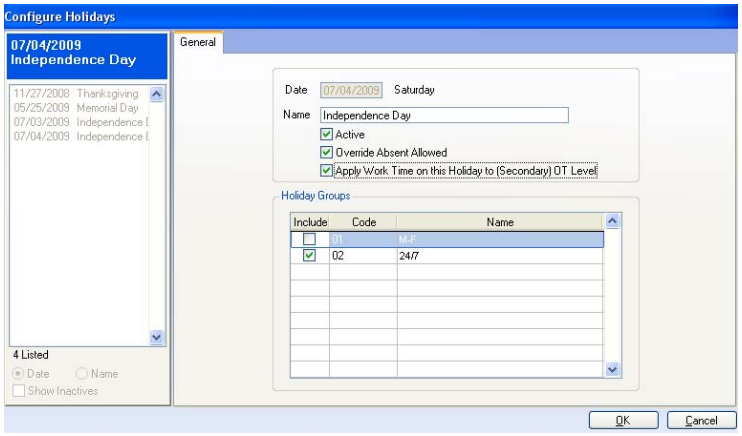


Figure 58: Configure Holidays

2. The *Configure Holidays* dialog box contains the following information:

Setting	Definition
Date	Enter the date on which the holiday will be observed. This is the date on which the Holiday Policies (set in *Policies*) will apply.
Name	Enter the name of the holiday.

Setting	Definition
Active	Check the Active box to indicate that this holiday will be observed.
Override Absent Allowed	Check this box if paid time for this Holiday should supersede a system-generated absence.
Apply Work Time on this Holiday to (Secondary) OT Level	Check this box if the holiday is paid at the secondary rate.
Holiday Groups	Click the Include box for each group the Holiday will be observed.

Add a Holiday

1. Click the **Configure** menu**, Holiday**. The *Configure Holiday* dialog box will open.
2. Click the **Add** button to add a new Holiday. The *General* tab will become available.

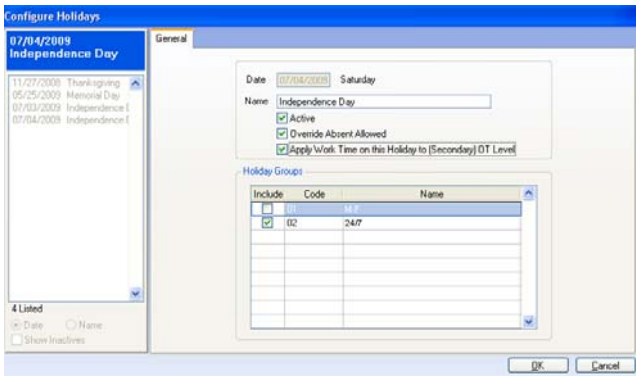


Figure 59: Adding a new Holiday

3. Fill in the settings as described in the *Configure Holidays* section.
4. Click **OK** to commit the changes and close the *Holiday* dialog box.
5. Click **Close** to exit the *Configure Holiday* dialog box.

Edit a Holiday

1. Click the **Configure** menu**, Holidays**. The *Configure Holidays* dialog box will open.
2. Highlight the Holiday you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Holiday.
4. Edit the settings as described in the *Configure Holiday* section.
   NOTE: The date cannot be modified.
5. Click **OK** to commit the changes and return to the *Configure Holiday* screen.
6. Click **Close** to exit the *Configure Holiday* dialog box.

Delete a Holiday

1. Click the **Configure** menu**, Holidays**. The *Configure Holidays* dialog box will open.
2. Highlight the Holiday you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 60: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Holidays* dialog box.

Holidays Groups

The Holidays Groups feature specifies which holidays are assigned to specific groups of employees. Holidays Groups must be defined in order to post different holidays to specific groups of employees. Some examples of holidays groups are:

- Executive
- Full-Time
- Union

Employees are assigned to a holiday group in the Employee Maintenance dialog box.

Configure Holiday Groups

1. Click the **Configure** menu**, Holidays Groups**. The *Configure Holidays Groups* window will open.

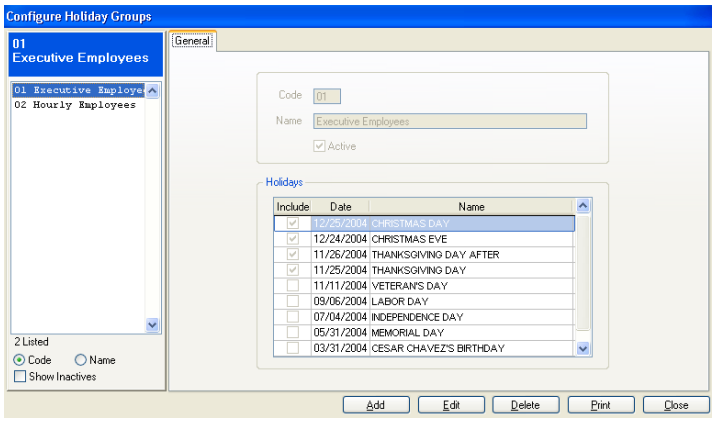


Figure 61: Configure Holidays Groups

2. The *Configure Holidays Groups* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter a unique code (up to two characters) to identify the holiday group. Once saved, this code cannot be changed.
Name	This is a required field. Enter the name of the holiday group as you want it to appear in the system. The holiday group name can be up to 30 characters long.
Active	Check the Active box to indicate that this holiday group will be observed.
Holidays	Click the Include box for each Holiday the Group will observe.

Add a Holiday Group

1. Click the **Configure** menu**, Holidays Groups**. The *Configure Holidays Groups* dialog box will open.
2. Click the **Add** button to add a new Holidays Groups. The *General* tab will become available.

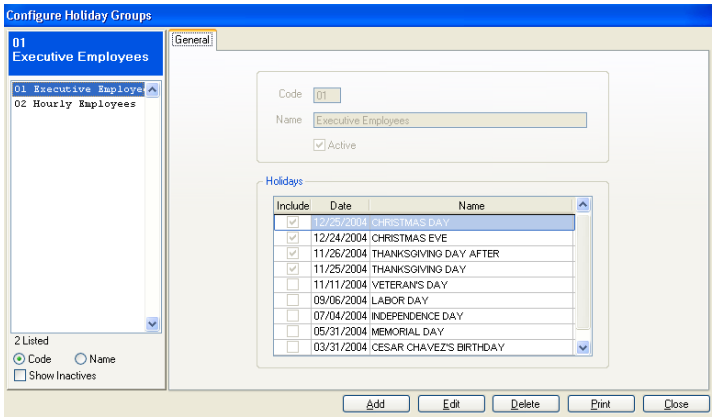


Figure 62: Adding a new Holidays Groups

3. Fill in the settings as described in the *Configure Holidays Groups* section.
4. Click **OK** to commit the changes and close the *Holidays Groups* dialog box.
5. Click **Close** to exit the *Configure Holiday*s Groups dialog box.

Edit a Holiday

1. Click the **Configure** menu**, Holidays Groups**. The *Configure Holidays Groups* dialog box will open.
2. Highlight the Holidays Groups you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Holidays Groups.
4. Edit the settings as described in the *Configure Holidays Groups* section. **NOTE:** The code cannot be modified.

5. Click **OK** to commit the changes and return to the *Configure Holidays Groups* screen.
6. Click **Close** to exit the *Configure Holidays Groups* dialog box.

Delete a Holidays Groups

1. Click the **Configure** menu**, Holidays Groups**. The *Configure Holidays Groups* dialog box will open.
2. Highlight the Holidays Groups you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 63: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Holidays Groups* dialog box.

Groups

User-defined groups are optional but very useful. Groups are used to organize and sort employees throughout Genesis Pro. They may be used to sort employees when generating reports, and are also used with Security to control which employees managers are allowed to edit. Some examples of employee groups are:

- Managers
- Union Employees
- Part-time Employees

Employees are assigned to a group in the Employee Maintenance dialog box.

Configure Groups

1. Click the **Configure** menu**, Groups**. The *Configure Groups* window will open.

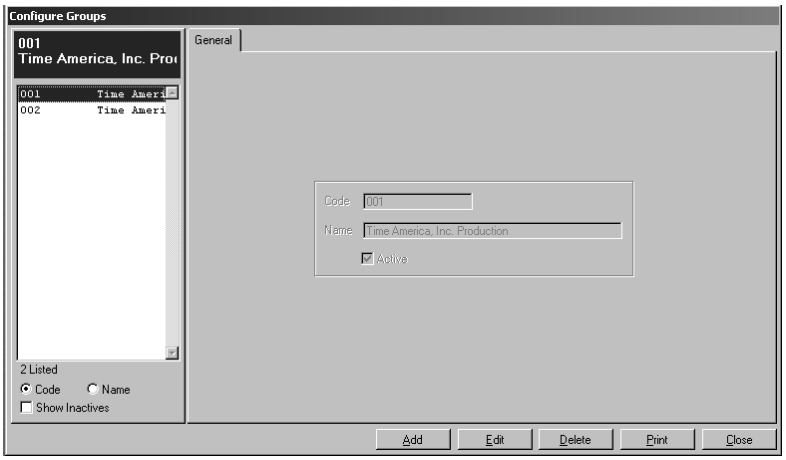


Figure 64: Configure Groups

2. The *Configure Groups* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter a unique code (up to 10 characters) to identify the employee group. Once saved, this code cannot be changed.
Name	This is a required field. Enter the group name, as you want it to appear in the system and on reports. The group name can be up to 30 characters long.
Active	Click the Active check box to indicate that the employee group is currently in use. Clear this check box if the group is not being used at this time.

Add a Group

1. Click the **Configure** menu**, Groups**. The *Configure Groups* dialog box will open.
2. Click the **Add** button to add a new Group. The *General* tab will become available.

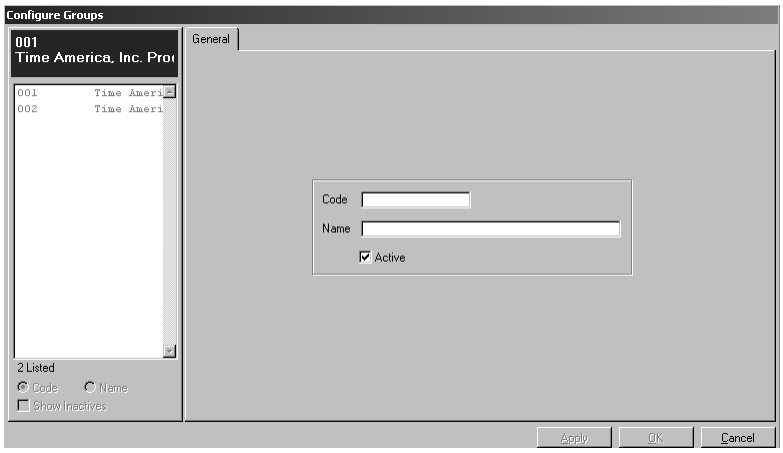


Figure 65: Adding a new Group

3. Fill in the settings as described in the *Configure Groups* section.
4. Click **OK** to commit the changes and close the *Group* dialog box.
5. Click **Close** to exit the *Configure Groups* dialog box.

Edit a Group

1. Click the **Configure** menu**, Groups**. The *Configure Groups* dialog box will open.
2. Highlight the Group you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Group.
4. Edit the settings as described in the *Configure Groups* section.
   NOTE: The ***Group Code*** cannot be changed.
5. Click **OK** to commit the changes and return to the *Configure Groups* screen.
6. Click **Close** to exit the *Configure Groups* dialog box.

Delete a Group

1. Click the **Configure** menu**, Groups**. The *Configure Groups* dialog box will open.
2. Highlight the Group you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 66: Deletion Confirmation

4. Click **OK** to confirm the deletion.

5. Click **Close** to exit the *Configure Groups* dialog box.

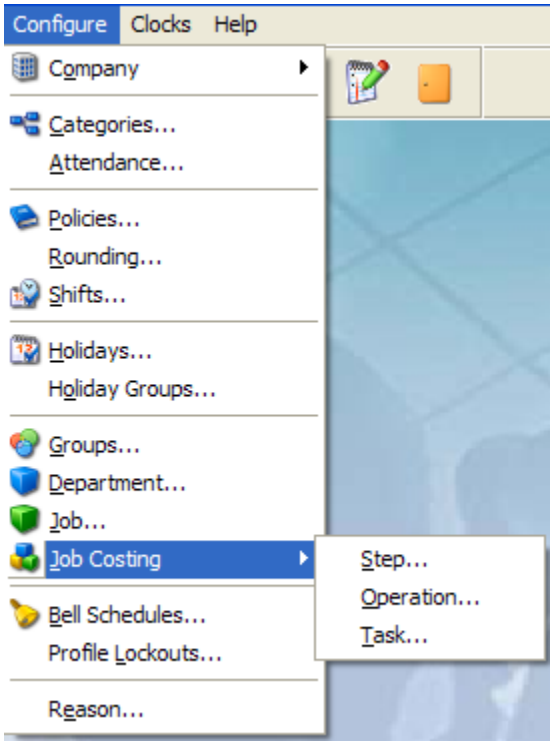
Job Costing

Job Costing is used to track employee time and labor costs by department, job step, operation or task both in terms of hours and money. Five levels of job costing are available: by default these are called Department, Job, Step, Operation and Task. Departments are divided into Jobs, Jobs are divided into Steps, Steps are divided into Operations, and Operations are further divided into Tasks. You may use one or all of these levels, depending upon your needs. Each item can be assigned an hourly wage and/or a piece rate, enabling accurate job cost reporting.

Departments, Jobs, Steps, Operations, and Tasks indicate the projects or tasks employees work on, and are used to track where employees spend their time. Employees can track their time by clocking into and/or transferring to a different Job Costing level. Wages and piece rates can be associated with the department, job, step, operation or task and the employee, enabling accurate job costing. Hours and wage budgets can be set for each level, enabling accurate budget vs. actual reporting.

NOTE: Step, Operation and Task are a part of a separate and optional module.

The concepts and mechanisms are the same for Departments, Jobs, Steps, Operations, and Tasks. The levels are optional and only available when the *Department, Job, Step, Operation,* and *Task* Use Flags are checked on the *Configure* tab of the *Main Company* dialog box. Also, if you changed the name used to refer to Departments, Jobs, Steps, Operations or Tasks (on the *Defaults* tab of the *Main Company* dialog box), that name will be used in lieu of “Department”, "Job", "Step", "Operation" or “Task”.



Departments

Departments are the top level in Job Costing. Departments indicate the business unit or section of the company that employees work for, and are used to track where employees spend their time. Departments serve many purposes in Genesis Pro. Employees can track their time to a department by clocking into and/or transferring to the department. Wages and piece rates can be associated with the department and employee, enabling accurate department costing. Hours and wage budgets can be set for the department, enabling accurate budget vs. actual reporting. Reports can be filtered and grouped by department.

Departments are optional and only available when the *Department* Use Flag is checked on the *Configure* tab of the *Main Company* dialog box. Also, if you changed the name used to refer to Departments (on the *Defaults* tab of the *Main Company* dialog box), that name will be used in lieu of "Department". For more information, see ***Main Company***, page 28.

Some examples of departments are:

- Accounting
- Administration
- Customer Service
- Research and Development
- Sales and Marketing
- Shipping

Configure Departments

1. Click the **Configure** menu**, Department**. The *Configure Department* window will open.

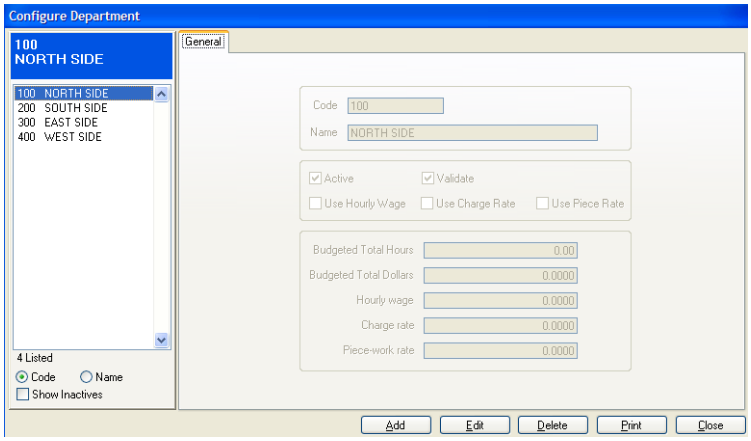


Figure 67: Configure Departments

2. The *Configure Department* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter a code to identify the department. The code's length and type (numeric or alphanumeric) is determined in the *Defaults* dialog box in the *Main Company* dialog box (see ***Main Company***, page 28.). Once saved, this code cannot be changed.
Name	This is a required field. Enter the department name, as it will appear in the system and on reports. The department name can be up to 30 characters long.
Active	Check this box to indicate that the department is currently in use. Clear this check box if the department is not being used at this time.
Validate	Check this box to send a Validation to the clocks. The clocks will then display this Department's name for employee confirmation when the employee enters its Department Code. **NOTE:** The ***Load Level Validation*** option must also be selected under *Polling* (see ***Polling,*** page 388) in order for this feature to be fully functional.
Use Hourly Wage	Check this box to pay all employees assigned to this department a standard hourly wage whenever they work in this department. Checking this box will enable the Hourly Wage field, in which you define the amount of the wage. **NOTE**: This Hourly Wage is also known as the **Level Wage**. If this wage is different than the employee's individual wage, the employee's individual wage takes precedence. To cause the Hourly Wage (Level Wage) to take precedence, check the ***Use Level Wage before default assignment wage*** option on the *Configure* tab of the *Configure Main Company* dialog box.
Use Charge Rate	Check this box to define the rate charged for all employees assigned to this Department whenever they work in this Department. Checking this box will enable the Charge Rate field, in which you define the amount of the rate.

Setting	Definition
Use Piece Rate	Check this box to pay employees according to the quantity of goods they produce. Checking this box will enable the Piece Work Rate field, in which you define the rate per item produced. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. This option may be used instead of or in conjunction with the ***Use Hourly Wage*****.** **NOTE**: In order to make this option fully functional, the clocks must be configured to accept piece rate entries. For more information, see ***Customizing Function Keys***, page 370.
Budgeted Total Hours	Enter the maximum number of hours (HH.MM) that are budgeted for this entire department per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the amount budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the department by the number of hours each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 40 hours per pay period = 400 total hours 400 total hours / 7 days in the pay period = **57.14** budgeted total hours

Setting	Definition
Budgeted Total Dollars	Enter the maximum number of dollars that are budgeted for this entire department per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the dollars budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the department by the dollar amount each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 600 dollars per pay period = 6000 total dollars 6000 total dollars / 7 days in the pay period = **857.14** budgeted total dollars.
Hourly Wage	Enter the hourly wage paid to employees working in this department. The ***Use Hourly Wage*** check box must be selected for this field to be available.
Charge Rate	Enter the charge rate received for the employees working in this department. The ***Use Charge Rate*** check box must be selected for this field to be available.
Piece Work Rate	Enter the amount per item produced (piece) paid to employees working in this department. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. The ***Use Piece Rate*** check box must be selected for this field to be available.

Add a Department

1. Click the **Configure** menu**, Department**. The *Configure Department* dialog box will open.
2. Click the **Add** button to add a new Department. The *General* tab will become available.

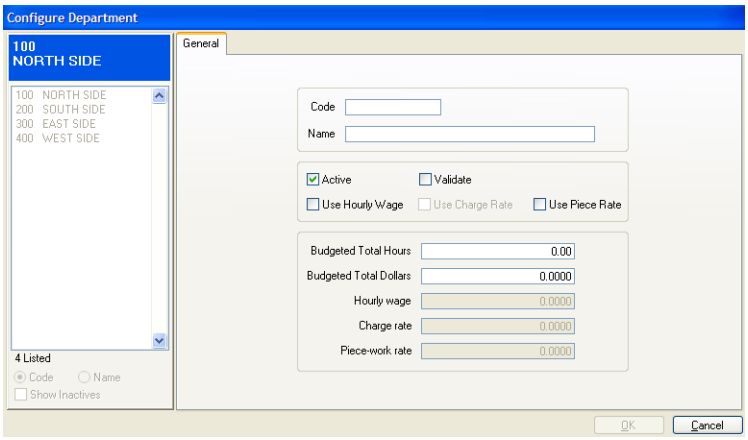


Figure 68: Adding a new Department

3. Fill in the settings as described in the *Configure Departments* section.
4. Click **OK** to commit the changes and close the *Department* dialog box.
5. Click **Close** to exit the *Configure Department* dialog box.

Edit a Department

1. Click the **Configure** menu**, Department**. The *Configure Department* dialog box will open.
2. Highlight the Department you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Department.

   NOTE: The ***Code*** field cannot be edited.
4. Edit the settings as described in the *Configure Departments* section.
5. Click **OK** to commit the changes and return to the *Configure Department* screen.
6. Click **Close** to exit the *Configure Department* dialog box.

Delete a Department

Departments that are in use cannot be deleted.

1. Click the **Configure** menu**, Department**. The *Configure Department* dialog box will open.
2. Highlight the Department you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

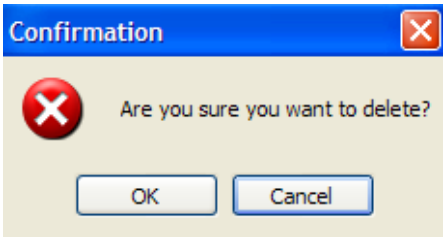


Figure 69: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Department* dialog box.

Jobs

Jobs are the second level in Job Costing. Jobs are used to track employee's time and labor cost in terms of hours and dollars. Jobs serve many purposes in Genesis Pro. Employees can track their time to a job by clocking into and/or transferring to the job. Wages and piece rates can be associated with the job and employee. Hours and wage budgets can be set for the job, enabling accurate budget vs. actual reporting.

Jobs are optional and only available when the *Department* and *Job* Use Flags are checked on the *Configure* tab of the *Main Company* dialog box. Also, if you changed the name used to refer to Jobs (on the *Defaults* tab of the *Main Company* dialog box), that name will be used in lieu of "Jobs". For more information, see ***Main Company***, page 28.

Some examples of Jobs might be:

- Welding
- Shipping
- Product Development
- Work Orders

Configure Jobs

Jobs are the second level of the Job Costing feature (Departments are the top level.)

1. Click the **Configure** menu**,** then **Job**. The *Configure Job* window will open.

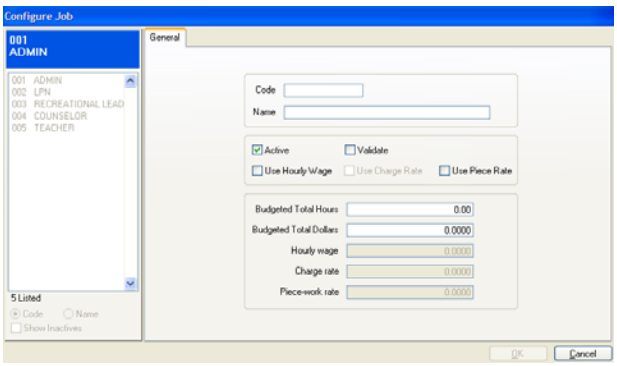


Figure 70: Configure Job

2. The *Configure Job* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter a code to identify the Job. The code's length and type (numeric or alphanumeric) is determined in the *Defaults* dialog box in the *Main Company* dialog box (see page 28). Once saved, this code cannot be changed.
Name	This is a required field. Enter the Job name, as it will appear in the system and on reports. The Job name can be up to 30 characters long.
Active	Check this box to indicate that the Job is currently in use. Clear this check box if the Job is not being used at this time.
Validate	Check this box to send a Validation to the clocks. The clocks will then display this Job's name for employee confirmation when the employee enters its Job Code. **NOTE:** The ***Load Level Validation*** option must also be selected under *Polling* (see Polling, page 388) in order for this feature to be fully functional.

Setting	Definition
Use Hourly Wage	Check this box to pay all employees assigned to this Job a standard hourly wage whenever they work in this Job. Checking this box will enable the ***Hourly Wage*** field, in which you define the amount of the wage. **NOTE**: This Hourly Wage is also known as the **Level Wage**. If this wage is different than the employee's individual wage, the employee's individual wage takes precedence. To cause the Hourly Wage (Level Wage) to take precedence, check the ***Use Level Wage before default assignment wage*** option on the *Configure* tab of the *Configure Main Company* dialog box.
Use Charge Rate	Check this box to define the rate charged for all employees assigned to this Job whenever they work in this Job. Checking this box will enable the Charge Rate field, in which you define the amount of the rate.
Use Piece Rate	Check this box to pay employees according to the quantity of goods they produce. Checking this box will enable the ***Piece Work Rate*** field, in which you define the rate per item produced. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. This option may be used instead of or in conjunction with the ***Use Hourly Wage*.** **NOTE**: In order to make this option fully functional, the clocks must be configured to accept piece rate entries. For more information, see ***Customizing Function Keys***, page 370.

Setting	Definition
Budgeted Total Hours	Enter the maximum number of hours (HH.MM) that are budgeted for this entire Job per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the amount budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the Job by the number of hours each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 40 hours per pay period = 400 total hours 400 total hours / 7 days in the pay period = **57.14** budgeted total hours
Budgeted Total Dollars	Enter the maximum number of dollars that are budgeted for this entire Job per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the dollars budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the Job by the dollar amount each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 600 dollars per pay period = 6000 total dollars 6000 total dollars / 7 days in the pay period = **857.14** budgeted total dollars.
Hourly Wage	Enter the hourly wage paid to employees working in this Job. The ***Use Hourly Wage*** check box must be selected for this field to be available.
Charge Rate	Enter the charge rate received for the employees working in this job. The ***Use Charge Rate*** check box must be selected for this field to be available.

Setting	Definition
Piece Work Rate	Enter the amount per item produced (piece) paid to employees working in this Job. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. The ***Use Piece Rate*** check box must be selected for this field to be available.

Add a Job

1. Click the **Configure** menu**,** then **Job**. The *Configure Job* dialog box will open.
2. Click the **Add** button to add a new Job. The *General* tab will become available.

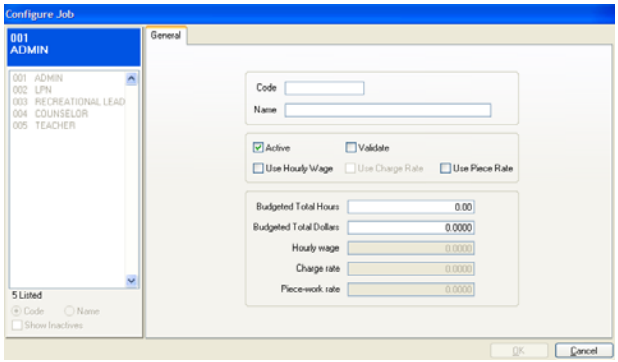


Figure 71: Adding a new Job

3. Fill in the settings as described in the *Configure Jobs* section.
4. Click **OK** to commit the changes and close the *Job* dialog box.
5. Click **Close** to exit the *Configure Job* dialog box.

Edit a Job

1. Click the **Configure** menu**,** then **Job**. The *Configure Job* dialog box will open.
2. Highlight the Job you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Job.
   NOTE: The ***Code*** field cannot be edited.
4. Edit the settings as described in the *Configure Jobs* section.
5. Click **OK** to commit the changes and return to the *Configure Job* screen.
6. Click **Close** to exit the *Configure Job* dialog box.

Delete a Job

Jobs that are in use cannot be deleted.

1. Click the **Configure** menu**,** then **Job**. The *Configure Job* dialog box will open.
2. Highlight the Job you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

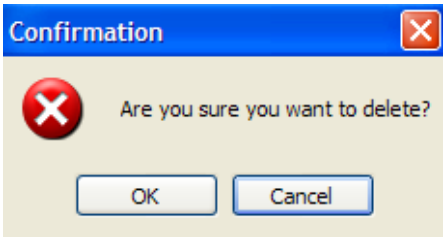


Figure 72: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Job* dialog box.

Steps

Steps are the third level in Job Costing. Steps are used to track employee's time and labor cost in terms of hours and dollars. Steps serve many purposes in Genesis Pro. Employees can track their time to a step by clocking into and/or transferring to the step. Wages and piece rates can be associated with the step and employee. Hours and wage budgets can be set for the step, enabling accurate budget vs. actual reporting.

Steps are optional and only available when the *Department, Job* and *Step* Use Flags are checked on the *Configure* tab of the *Main Company* dialog box. Also, if you changed the name used to refer to Steps (on the *Defaults* tab of the *Main Company* dialog box), that name will be used in lieu of "Steps". For more information, see ***Main Company***, page 28.

Configure Steps

Steps are the third level of the Job Costing feature (Departments and Jobs are above it.)

1. Click the **Configure** menu**, Job Costing, Step**. The *Configure Step* window will open.

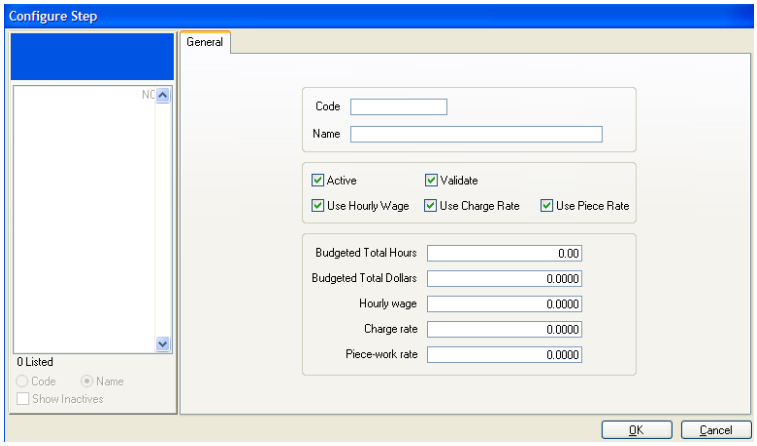


Figure 73: Configure Step

2. The *Configure Step* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter a code to identify the Step. The code's length and type (numeric or alphanumeric) is determined in the *Defaults* dialog box in the *Main Company* dialog box (see page 28). Once saved, this code cannot be changed.
Name	This is a required field. Enter the Step name, as it will appear in the system and on reports. The Step name can be up to 30 characters long.
Active	Check this box to indicate that the Step is currently in use. Clear this check box if the Step is not being used at this time.
Validate	Check this box to send a Validation to the clocks. The clocks will then display this Step's name for employee confirmation when the employee enters its Step Code. **NOTE:** The ***Load Level Validation*** option must also be selected under *Polling* (see ***Polling***, page 388) in order for this feature to be fully functional.
Use Hourly Wage	Check this box to pay all employees assigned to this Step a standard hourly wage whenever they work in this Step. Checking this box will enable the Hourly Wage field, in which you define the amount of the wage. **NOTE**: This Hourly Wage is also known as the ***Level Wage***. If this wage is different than the employee's individual wage, the employee's individual wage takes precedence. To cause the Hourly Wage (Level Wage) to take precedence, check the ***Use Level Wage before default assignment wage*** option on the *Configure* tab of the *Configure Main Company* dialog box.
Use Charge Rate	Check this box to define the rate charged for all employees assigned to this Step whenever they work in this Step. Checking this box will enable the Charge Rate field, in which you define the amount of the rate.

Setting	Definition
Use Piece Rate	Check this box to pay employees according to the quantity of goods they produce. Checking this box will enable the ***Piece Work Rate*** field, in which you define the rate per item produced. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. This option may be used instead of or in conjunction with the ***Use Hourly Wage*****.** **NOTE**: In order to make this option fully functional, the clocks must be configured to accept piece rate entries. For more information, see ***Customizing Function Keys***, page 370.
Budgeted Total Hours	Enter the maximum number of hours (HH.MM) that are budgeted for this entire Step per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the amount budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the Step by the number of hours each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 40 hours per pay period = 400 total hours 400 total hours / 7 days in the pay period = **57.14** budgeted total hours

Setting	Definition
Budgeted Total Dollars	Enter the maximum number of dollars that are budgeted for this entire Step per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the dollars budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the Step by the dollar amount each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 600 dollars per pay period = 6000 total dollars 6000 total dollars / 7 days in the pay period = **857.14** budgeted total dollars.
Hourly Wage	Enter the hourly wage paid to employees working in this Step. The ***Use Hourly Wage*** check box must be selected for this field to be available.
Charge Rate	Enter the charge rate received for the employees working in this step. The ***Use Charge Rate*** check box must be selected for this field to be available.
Piece Work Rate	Enter the amount per item produced (piece) paid to employees working in this Step. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. The ***Use Piece Rate*** check box must be selected for this field to be available.

Add a Step

1. Click the **Configure** menu**, Job Costing, Step**. The *Configure Step* dialog box will open.
2. Click the **Add** button to add a new Step. The *General* tab will become available.

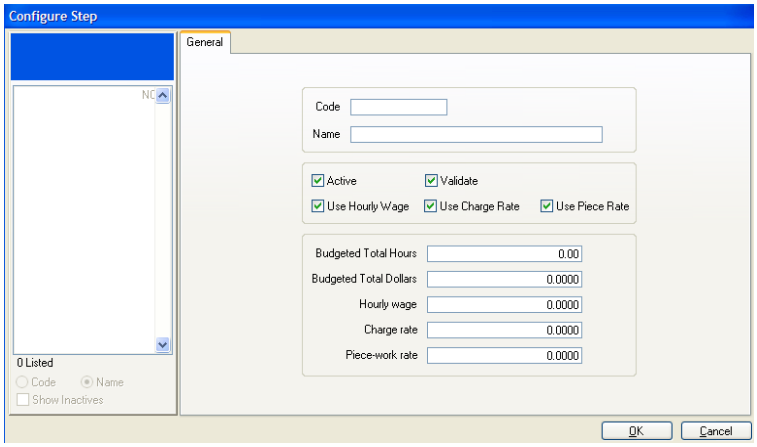


Figure 74: Adding a new Step

3. Fill in the settings as described in the *Configure Steps* section.
4. Click **OK** to commit the changes and close the *Step* dialog box.
5. Click **Close** to exit the *Configure Step* dialog box.

Edit a Step

1. Click the **Configure** menu**, Job Costing, Step**. The *Configure Step* dialog box will open.
2. Highlight the Step you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Step.
   NOTE: The ***Code*** field cannot be edited.
4. Edit the settings as described in the *Configure Steps* section.
5. Click **OK** to commit the changes and return to the *Configure Step* screen.
6. Click **Close** to exit the *Configure Step* dialog box.

Delete a Step

Steps that are in use cannot be deleted.

1. Click the **Configure** menu**, Job Costing, Step**. The *Configure Step* dialog box will open.
2. Highlight the Step you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

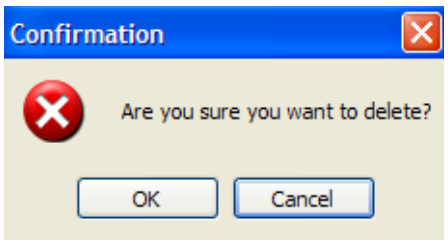


Figure 75: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Step* dialog box.

Operations

Operations are the fourth level in Job Costing. Operations are used to track employee's time and labor cost in terms of hours and dollars. Operations serve many purposes in Genesis Pro. Employees can track their time to an operation by clocking into and/or transferring to the operation. Wages and piece rates can be associated with the operation and employee. Hours and wage budgets can be set for the operation, enabling accurate budget vs. actual reporting.

Operations are optional and only available when the *Department, Job, Step* and *Operation* Use Flags are checked on the *Configure* tab of the *Main Company* dialog box. Also, if you changed the name used to refer to Operations (on the *Defaults* tab of the *Main Company* dialog box), that name will be used in lieu of "Operations". For more information, see ***Main Company***, page 28.

Configure Operations

Operations are the fourth level of the Job Costing feature (Departments, Jobs, Steps are above it.)

1. Click the **Configure** menu**, Job Costing, Operation**. The *ConfigureOperation* window will open.

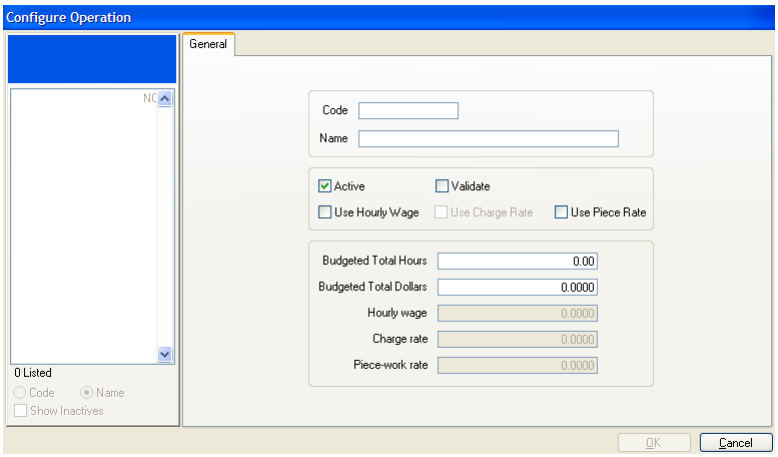


Figure 76: Configure Operation

2. The *Configure Operation* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter a code to identify the Operation. The code's length and type (numeric or alphanumeric) is determined in the *Defaults* dialog box in the *Main Company* dialog box (see page 28). Once saved, this code cannot be changed.

Setting	Definition
Name	This is a required field. Enter the Operation name, as it will appear in the system and on reports. The Operation name can be up to 30 characters long.
Active	Check this box to indicate that the Operation is currently in use. Clear this check box if the Operation is not being used at this time.
Validate	Check this box to send a Validation to the clocks. The clocks will then display this Operation's name for employee confirmation when the employee enters its Operation Code. **NOTE:** The ***Load Level Validation*** option must also be selected under *Polling* (see Polling, page 388) in order for this feature to be fully functional.
Use Hourly Wage	Check this box to pay all employees assigned to this Operation a standard hourly wage whenever they work in this Operation. Checking this box will enable the Hourly Wage field, in which you define the amount of the wage. **NOTE**: This Hourly Wage is also known as the ***Level Wage***. If this wage is different than the employee's individual wage, the employee's individual wage takes precedence. To cause the Hourly Wage (Level Wage) to take precedence, check the ***Use Level Wage before default assignment wage*** option on the *Configure* tab of the *Configure Main Company* dialog box.
Use Charge Rate	Check this box to define the rate charged for all employees assigned to this Operation whenever they work in this Operation. Checking this box will enable the Charge Rate field, in which you define the amount of the rate.

Setting	Definition
Use Piece Rate	Check this box to pay employees according to the quantity of goods they produce. Checking this box will enable the Piece Work Rate field, in which you define the rate per item produced. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. This option may be used instead of or in conjunction with the ***Use Hourly Wage*****.** **NOTE**: In order to make this option fully functional, the clocks must be configured to accept piece rate entries. For more information, see ***Customizing Function Keys***, page 370.
Budgeted Total Hours	Enter the maximum number of hours (HH.MM) that are budgeted for this entire Operation per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the amount budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the Operation by the number of hours each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 40 hours per pay period = 400 total hours 400 total hours / 7 days in the pay period = **57.14** budgeted total hours

Setting	Definition
Budgeted Total Dollars	Enter the maximum number of dollars that are budgeted for this entire Operation per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the dollars budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the Operation by the dollar amount each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 600 dollars per pay period = 6000 total dollars 6000 total dollars / 7 days in the pay period = **857.14** budgeted total dollars.
Hourly Wage	Enter the hourly wage paid to employees working in this Operation. The ***Use Hourly Wage*** check box must be selected for this field to be available.
Charge Rate	Enter the charge rate received for the employees working in this operation. The ***Use Charge Rate*** check box must be selected for this field to be available.
Piece Work Rate	Enter the amount per item produced (piece) paid to employees working in this Operation. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. The ***Use Piece Rate*** check box must be selected for this field to be available.

Add an Operation

1. Click the **Configure** menu**, Job Costing, Operation**. The *Configure Operation* dialog box will open.
2. Click the **Add** button to add a new Operation. The *General* tab will become available.

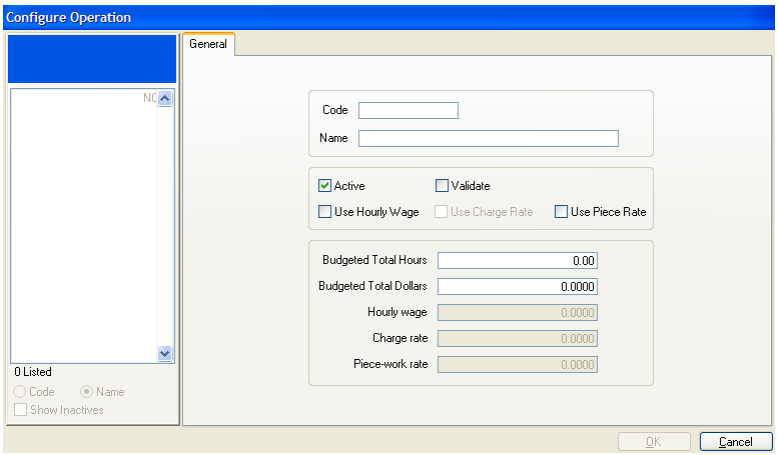


Figure 77: Adding a new Operation

3. Fill in the settings as described in the *Configure Operations* section.
4. Click **OK** to commit the changes and close the *Operation* dialog box.
5. Click **Close** to exit the *Configure Operation* dialog box.

Edit an Operation

1. Click the **Configure** menu**, Job Costing, Operation**. The *Configure Operation* dialog box will open.
2. Highlight the Operation you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Operation.

   NOTE: The ***Code*** field cannot be edited.
4. Edit the settings as described in the *Configure Operations* section.
5. Click **OK** to commit the changes and return to the *Configure Operation* screen.
6. Click **Close** to exit the *Configure Operation* dialog box.

Delete an Operation

Operations that are in use cannot be deleted.

1. Click the **Configure** menu**, Job Costing, Operation**. The *Configure Operation* dialog box will open.
2. Highlight the Operation you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

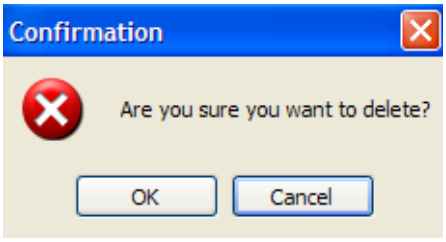


Figure 78: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Operation* dialog box.

Tasks

Tasks are the fifth level in Job Costing. Tasks are used to track employee's time and labor cost in terms of hours and dollars. Tasks serve many purposes in Genesis Pro. Employees can track their time to a task by clocking into and/or transferring to the task. Wages and piece rates can be associated with the task and employee. Hours and wage budgets can be set for the task, enabling accurate budget vs. actual reporting.

Tasks are optional and only available when the *Department, Job, Step, Operation* and *Task* Use Flags are checked on the *Configure* tab of the *Main Company* dialog box. Also, if you changed the name used to refer to Tasks (on the *Defaults* tab of the *Main Company* dialog box), that name will be used in lieu of "Tasks". For more information, see ***Main Company***, page 28.

Configure Tasks

Tasks are the fifth level of the Job Costing feature (Departments, Jobs, Steps, and Operation are above it.)

1. Click the **Configure** menu**, Job Costing, Task**. The *Configure Task* window will open.

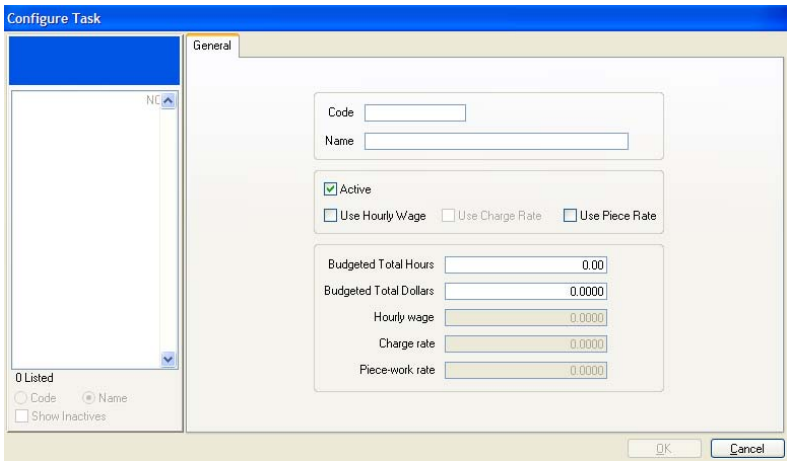


Figure 79: Configure Task

2. The *Configure Task* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter a code to identify the Task. The code's length and type (numeric or alphanumeric) is determined in the *Defaults* dialog box in the *Main Company* dialog box (see page 28). Once saved, this code cannot be changed.
Name	This is a required field. Enter the Task name, as it will appear in the system and on reports. The Task name can be up to 30 characters long.
Active	Check this box to indicate that the Task is currently in use. Clear this check box if the Task is not being used at this time.
Validate	Check this box to send a Validation to the clocks. The clocks will then display this Task's name for employee confirmation when the employee enters its Task Code. **NOTE:** The ***Load Level Validation*** option must also be selected under *Polling* (see Polling, page 388) in order for this feature to be fully functional.
Use Hourly Wage	Check this box to pay all employees assigned to this Task a standard hourly wage whenever they work in this Task. Checking this box will enable the Hourly Wage field, in which you define the amount of the wage. **NOTE**: This Hourly Wage is also known as the ***Level Wage***. If this wage is different than the employee's individual wage, the employee's individual wage takes precedence. To cause the Hourly Wage (Level Wage) to take precedence, check the ***Use Level Wage before default assignment wage*** option on the *Configure* tab of the *Configure Main Company* dialog box.
Use Charge Rate	Check this box to define the rate charged for all employees assigned to this Task whenever they work in this Task. Checking this box will enable the Charge Rate field, in which you define the amount of the rate.

Setting	Definition
Use Piece Rate	Check this box to pay employees according to the quantity of goods they produce. Checking this box will enable the Piece Work Rate field, in which you define the rate per item produced. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. This option may be used instead of or in conjunction with the ***Use Hourly Wage*****.** **NOTE**: In order to make this option fully functional, the clocks must be configured to accept piece rate entries. For more information, see ***Customizing Function Keys***, page 370.
Budgeted Total Hours	Enter the maximum number of hours (HH.MM) that are budgeted for this entire Task per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the amount budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the Task by the number of hours each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 40 hours per pay period = 400 total hours 400 total hours / 7 days in the pay period = **57.14** budgeted total hours

Setting	Definition
Budgeted Total Dollars	Enter the maximum number of dollars that are budgeted for this entire Task per day in the pay period. This information is used for Actual vs. Budgeted reports only: it does not impact the employee's ability to clock in. This field is optional. This number indicates the dollars budgeted per day in the pay period. Calculate this number by multiplying the number of employees working in the Task by the dollar amount each employee is expected to accumulate in the pay period. This number is then divided by the total number of days in the pay period. **Example** 10 employees X 600 dollars per pay period = 6000 total dollars 6000 total dollars / 7 days in the pay period = **857.14** budgeted total dollars.
Hourly Wage	Enter the hourly wage paid to employees working in this Task. The ***Use Hourly Wage*** check box must be selected for this field to be available.
Charge Rate	Enter the charge rate received for the employees working in this task. The ***Use Charge Rate*** check box must be selected for this field to be available.
Piece Work Rate	Enter the amount per item produced (piece) paid to employees working in this Task. Employees will enter the number of pieces produced at the clock and will be paid this rate for each piece. The ***Use Piece Rate*** check box must be selected for this field to be available.

Add an Task

1. Click the **Configure** menu**, Job Costing, Task**. The *Configure Task* dialog box will open.
2. Click the **Add** button to add a new Task. The *General* tab will become available.

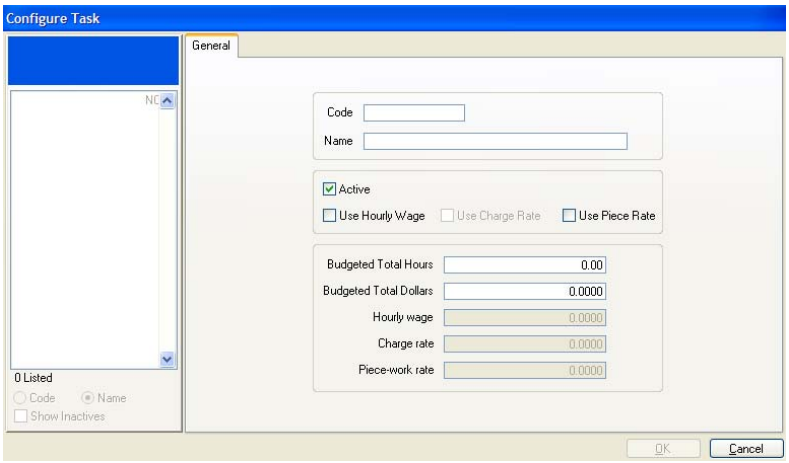


Figure 80: Adding a new Task

3. Fill in the settings as described in the *Configure Task* section.
4. Click **OK** to commit the changes and close the *Task* dialog box.
5. Click **Close** to exit the *Configure Task* dialog box.

Edit an Task

1. Click the **Configure** menu**, Job Costing, Task**. The *Configure Task* dialog box will open.
2. Highlight the Task you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Task.
   NOTE: The ***Code*** field cannot be edited.
4. Edit the settings as described in the *Configure Tasks* section.
5. Click **OK** to commit the changes and return to the *Configure Task* screen.
6. Click **Close** to exit the *Configure Task* dialog box.

Delete an Task

Tasks that are in use cannot be deleted.

1. Click the **Configure** menu**, Job Costing, Task**. The *Configure Task* dialog box will open.
2. Highlight the Task you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

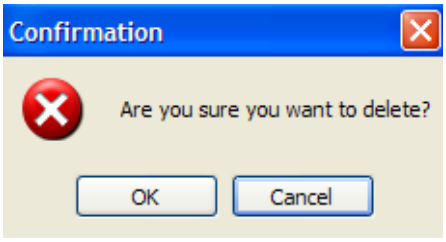


Figure 81: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Task* dialog box.

Bell Schedules

The Bell Schedules module allows your Time clock to activate a bell at specified times of day. For example, you might have a bell ring to announce the start of a shift, break or lunch, and the end of the day. The bell schedule is defined by the day of the week, the time of day, and the duration of the bell. The Bell Schedules module can ring up to 336 bells per Time clock per week.

Each Bell Schedule template can contain multiple bell details. Once the Bell Schedule has been created, you will add the individual dates and times the bells will ring. The Bell Schedule is then downloaded to the appropriate Time clocks.

Configure Bell Schedules

1. Click the **Configure** menu**, Bell Schedules**. The *Configure Bells* window will open.

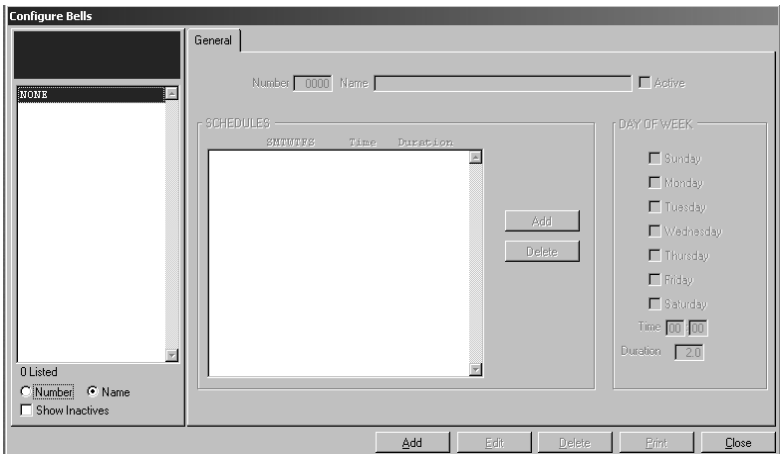


Figure 82: Configure Bells

2. The *Configure Bells* dialog box contains the following information:

Setting	Definition
Number	This is a required field. Enter a 4-digit number to identify the bell schedule. Once saved, this number cannot be changed.
Name	This is a required field. The bell schedule name can be up to 30 characters long.

Active	Click the Active check box to indicate that the Bell Schedule is currently in use. Uncheck this box if the Schedule is not being used at this time.
Schedules	Lists the individual bell days and times entered.
Number	Indicates the order the bells will ring.
SMTWTFS	Indicates the day(s) of the week the bell will ring.
Time	Indicates the time at which the bell will ring.
Duration	Indicates how long the bell will ring.
Day of Week	Indicates the day(s) of the week the bell selected in the Schedules list will ring.
Time	Indicates the time at which the bell selected in the Schedules list will ring.
Duration	Indicates how long the bell selected in the Schedules list will ring.

Add a Bell Schedule

1. Click the **Configure** menu**, Bell Schedules**. The *Configure Bell Schedule* dialog box will open.
2. Click the **Add** button to add a new Bell Schedule. The *General* tab will become available.

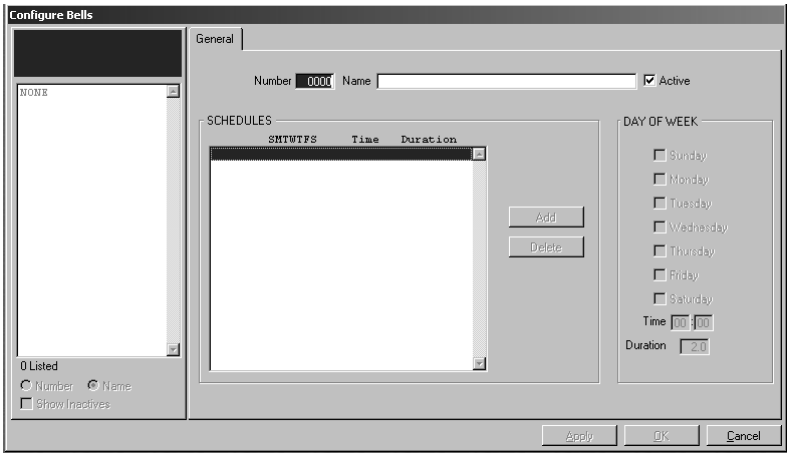


Figure 83: Adding a new Bell Schedule

3. Enter in the Number, Name and Active status.
   NOTE: As soon as the Number is entered, the **Add** button in the center of the screen will become available.
4. Click the **Add** button in the center of the screen to add the individual bell details. The *Bell Details* window will open.

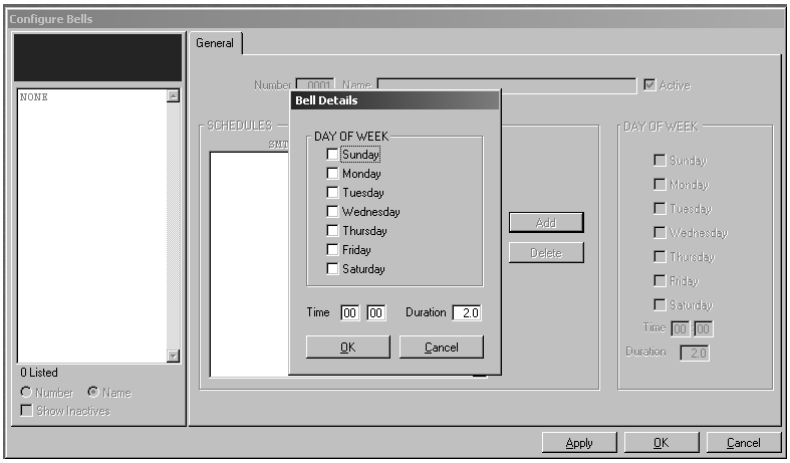


Figure 84: Bell Schedules: Bell Details

5. Select the days of the week you want the bell to ring.
6. Enter the time (HH:MM) at which you want the bell to ring. This must be entered in military time.
7. Enter the duration for the bell (how long the bell should ring). The default value is 2.0 seconds.
8. Click **OK** to commit the changes and close the *Bell Details* dialog box.
9. Repeat Steps 4 through 8 to add all the Bell Details for this schedule.
10. Click **OK** to commit the changes and return to the *Configure Bells* screen.
11. Click **Close** to exit the *Configure Bells* dialog box.

Edit a Bell Schedule

1. Click the **Configure** menu**, Bell Schedules**. The *Configure Bells* dialog box will open.
2. Highlight the Bell Schedule you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Bell Schedule.
4. Edit the settings as described in the *Configure Bell Schedule* section.
5. Click **OK** to commit the changes and return to the *Configure Bells* screen.
6. Click **Close** to exit the *Configure Bells* dialog box.

Delete a Bell Schedule

Bell Schedules that are in use cannot be deleted.

1. Click the **Configure** menu**, Bell Schedules**. The *Configure Bells* dialog box will open.
2. Highlight the Bell Schedule you wish to delete using the list at the side of the screen.

3. Click the **Delete** button. You will be prompted:

Figure 85: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Bell Schedules* dialog box.

Profile Lockouts

The Profile Lockouts module controls when an employee can punch at a Time clock. Employees can be given a lockout or a warning message when trying to punch In or Out at times that are restricted. Employees who are locked out are not permitted to complete their transaction but may have a supervisor punch them in by overriding the lockout.

You can also use the Profile Lockouts to send messages at certain times. For example, if you want to alert employees that they are clocking in too early, you could create a Profile Schedule with a "Too Early" message that displays when the employee clocks during certain hours of the day.

Lockout profiles are made up of Profile Schedules, which can contain up to 8 different time frames, each with its lockout and/or message. Each Profile Schedule specifies the time frames during which the lockout and/or message will display. There are 15 Profile Schedules available, and 17 different lockout/messages available.

After the lockout profile is complete, it is downloaded to the time clocks at which the profile will apply. Employees are assigned to the clocks and are assigned one profile schedule for each day of the week.

Profile Lockouts Example

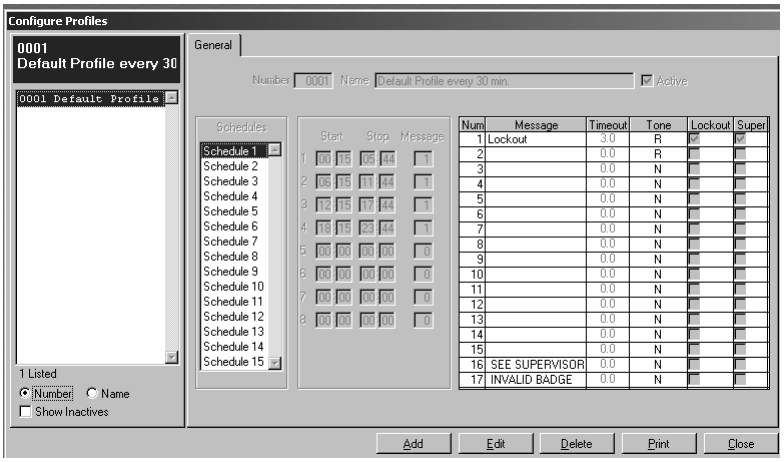
The company wants to make sure that employees:

- can't punch earlier than 6am or later than 7pm on weekdays.
- can't punch at all on weekends.

For this scenario, you would create a Profile Lockout that contains two Profile Schedules. Schedule 1 would lockout employees between midnight and 6am and between 7pm and 11:59pm. Schedule 2 would lockout employees between midnight and 11:59pm (all day). The Profile Lockout would be downloaded to the clocks. On the *Profiles* tab of the Configure Employee dialog box for each employee, you would choose Schedule 1 for Monday through Friday, and Schedule 2 for Saturday and Sunday.

Configure Profile Lockouts

1. Click the **Configure** menu**, Profile Lockouts**. The *Configure Profiles* window will open.



2. The *Configure Profiles* dialog box contains the following information:

Setting	Definition
Number	This is a required field. Enter a unique 4-digit number to identify the lockout profile. Once saved, this number cannot be changed.
Name	This is a required field. Type the lockout profile name, as you want it to appear in the system and on reports. The lockout profile name can be up to 30 characters long.
Active	Click the Active check box to indicate that the Profile is currently in use. Uncheck this box if the Profile is not being used at this time.
Schedules	Each profile contains up to 15 different lockout schedules. Each schedule may have up to eight time frames specifying when an employee can (and cannot) enter a punch. Messages may also be associated with each time frame. Select the Schedule you wish to configure by clicking on it in the Schedules list. Begin by setting up Schedule 1 and continue sequentially down the list using as many schedules as necessary to define the profile. Not all schedules must be used.
Start	For each time frame in each schedule, type the lockout starting time in HH:MM. Time must be entered in military format. Up to eight starts and stop times may be established per schedule. 00:00 indicates midnight.
Stop	For each time frame in each schedule, type the lockout stopping time in HH:MM. Time must be entered in military format. Up to eight starts and stop times may be established per schedule. 00:00 indicates midnight.
Message	For each time frame in each schedule, select the message number (from the ***Message*** box to the right) that displays on the time clock when an employee punches during the time frame specified.
Num	Indicates the unique code for this message. This is the number entered in the ***Message*** field.

Message	Type the message text (up to 35 characters) that displays when an employee punches. You may leave this field blank, in which case no message displays. **Examples:** • See supervisor. • Punch accepted. • Late-no punch.
Timeout	Enter the length of time (duration) the message displays on the time clock in seconds and tenth of a second. For example, 2.0 means the message displays for two seconds. The maximum message timeout is 9.9 seconds. If 0.0 is entered, no message displays.
Tone	The time clock has a distinct accept and reject tone that can be sounded when the message displays. Select from one of the following options. • **Accept** • **Reject** • **None:** Select this option if you do not want a tone to sound.
Lockout	Check this box to prevent the time clock from accepting an employee's punch during the assigned time frame. Clear this check box to allow a punch.
Super	Check this box to allow a supervisor to override a lockout by punching on behalf of the employee with a supervisor badge. This option is only available when the ***Lockout*** check box is selected.

Add a Profile Lockout

1. Click the **Configure** menu**, Profile Lockouts**. The *Configure Profiles* dialog box will open.
2. Click the **Add** button to add a new Profile Lockout. The *General* tab will become available.

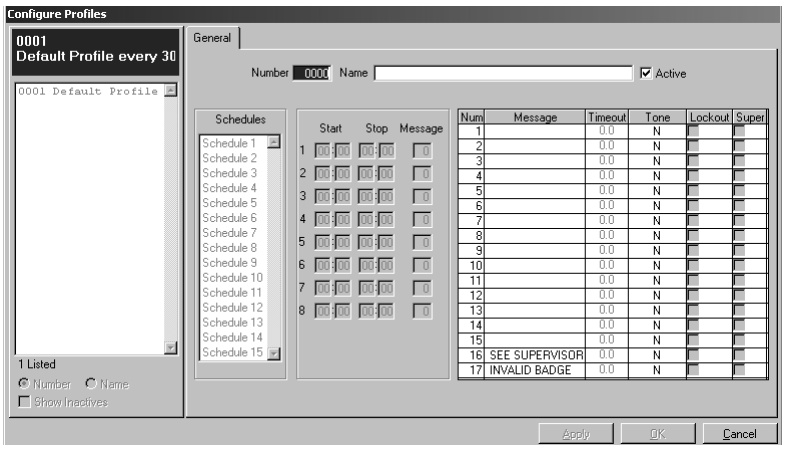


Figure 86: Adding a new Profile Lockout

3. Fill in the settings as described in the *Configure Profile Lockouts* section.
4. Click **OK** to commit the changes and close the *Configure Profiles* dialog box.
5. Click **Close** to exit the *Configure Profiles* dialog box.

Edit a Profile Lockout

1. Click the **Configure** menu**, Profile Lockouts**. The *Configure Profile Lockouts* dialog box will open.
2. Highlight the Profile Lockout you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Profile Lockout.

   NOTE: The ***Profile Number*** cannot be edited.
4. Edit the settings as described in the *Configure Profile Lockout* section.
5. Click **OK** to commit the changes and return to the *Configure Profile Lockout* screen.
6. Click **Close** to exit the *Configure Profile Lockout* dialog box.

Delete a Profile Lockout

Profile Lockouts that are in use cannot be deleted.

1. Click the **Configure** menu**, Profile Lockouts**. The *Configure Profile Lockouts* dialog box will open.
2. Highlight the Profile Lockout you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 87: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Profile Lockouts* dialog box.

Reasons

Reason codes are added to an employee's transaction through the Online Timecard. They are used to denote a specific reason for the transaction.

Configure Reasons

1. Click the **Configure** menu**, Reason**. The *Configure Reasons* window will open.

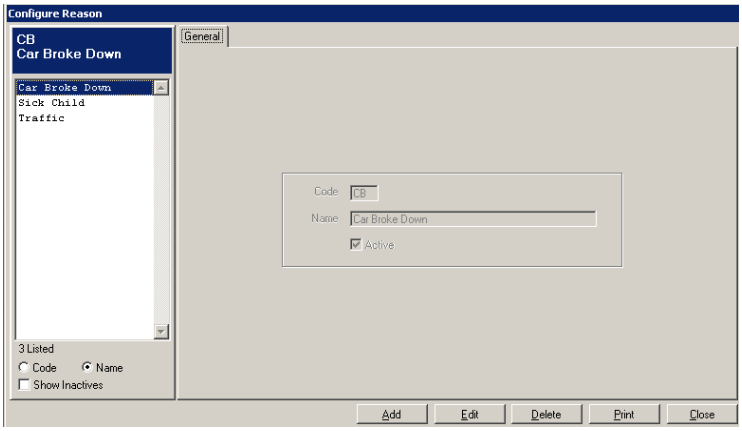


Figure 88: Configure Reasons

2. The *Configure Reasons* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter a unique code (up to 10 characters) to identify the reason. Once saved, this code cannot be changed.
Name	This is a required field. Enter the reason, as you want it to appear in the system. The reason name can be up to 30 characters long.
Active	Click the Active check box to indicate that the reason is currently in use. Clear this check box if the reason is not being used at this time.

Add a Reason

1. Click the **Configure** menu**, Reason**. The *Configure Reasons* dialog box will open.
2. Click the **Add** button to add a new Reason. The *General* tab will become available.

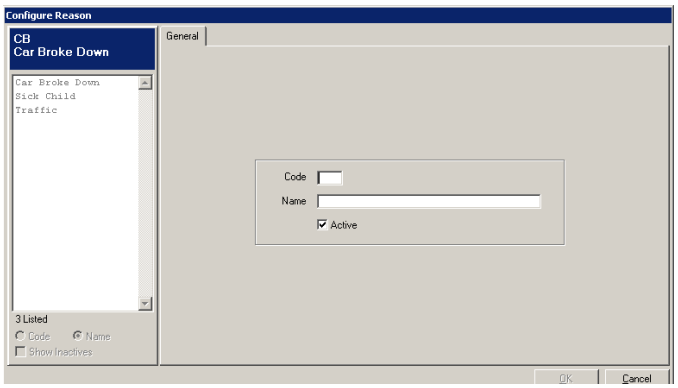


Figure 89: Adding a new Reason

3. Fill in the settings as described in the *Configure Reasons* section.
4. Click **OK** to commit the changes and close the *Reasons* dialog box.
5. Click **Close** to exit the *Configure Reasons* dialog box.

Edit a Reason

1. Click the **Configure** menu**, Reasons**. The *Configure Reasons* dialog box will open.
2. Highlight the Reason you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Reason.
4. Edit the settings as described in the *Configure Reasons* section.
   NOTE: The ***Reason Code*** cannot be changed.
5. Click **OK** to commit the changes and return to the *Configure Reasons* screen.
6. Click **Close** to exit the *Configure Reasons* dialog box.

Delete a Reason

1. Click the **Configure** menu**, Reasons**. The *Configure Reasons* dialog box will open.
2. Highlight the Reason you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 90: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Reasons* dialog box.

Security

Security access determines who can log in to the Genesis Pro, which employees they are allowed to manage and which areas of the program they are permitted to access.

Security is established in two steps.

1. Create the Security Levels that specify which program features are accessible.
2. Add User accounts.

Users are given a login id and password, are assigned to a Security Level, and are granted access to select groups of employees.

You may define an unlimited number of Security Levels and Users. The number of users logged in at one time is limited by the number of User Licenses installed.

There are four commands within the Security menu, all of which are described in the following sections.

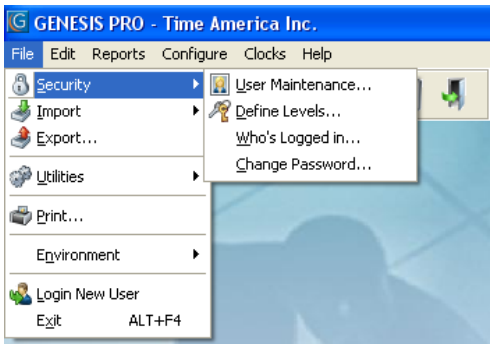


Figure 91: Security Menu

Configure Security Levels

Security Levels define which areas of the program are accessible and what can be done in them. Security Levels should be configured prior to adding Users. Examples of Security Levels are:

- Branch Managers
- Line Supervisors
- Payroll/HR

Up to four options are available for each feature. As the function of these options is the same for each feature, they are described once here for ease of use:

Option	Definition
View	Grants read-only access to items.
Add	Allows the user to add new items.
Edit	Allows the user to edit existing items.
Delete	Allows the user to delete existing items.

1. Click the **File** menu**, Security, Define Levels**. The *Configure Security Levels* window will open.

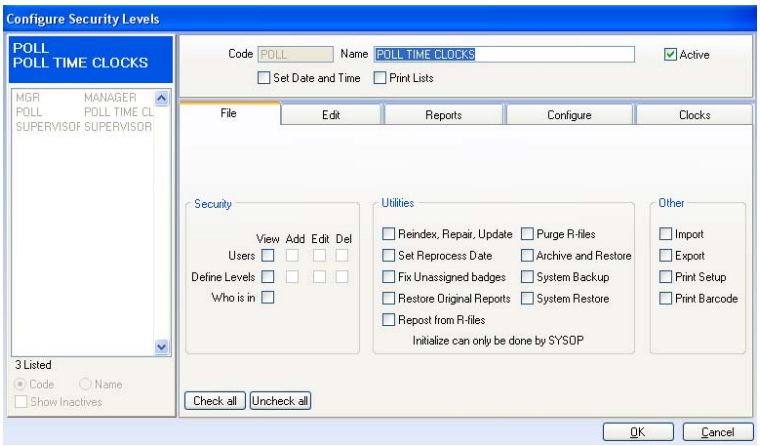


Figure 92: Configure Security Levels

2. The *Configure Security Levels* dialog box contains some general settings and several tabs, all of which are described below.

Setting	Definition
Code	This field is required. Enter a unique code (up to 10 characters) to identify the security level. Once saved, this ***Code*** cannot be changed.
Name	Enter a description of the security level in this field. The description can be up to 30 characters long.
Active	Click the Active check box to indicate that the level is currently in use. Uncheck this box if the level is not being used at this time.
Set Date and Time	Check this box to allow the user to update the date and time of the PC.
Print Lists	Click the Print Lists check box to allow the user to print all available listings reports

3. The *File* tab grants access to features under the **File** menu and contains the following information:

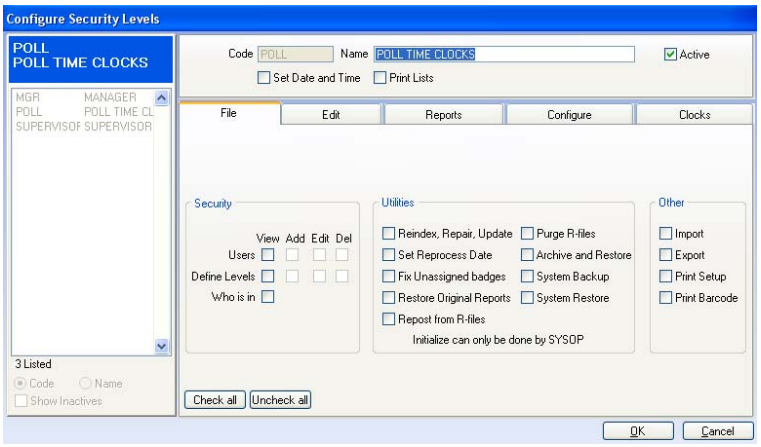


Figure 93: Security Levels: File tab

Setting	Definition
Security	This section defines the user's access rights to the **File, Security** menu's features.
Users	Defines the user's access rights to User Maintenance settings. The options are ***View***, ***Add***, ***Edit*** and/or ***Delete***. For more information on User Maintenance, see page 140.
Define Levels	Defines the user's access rights to Security Levels settings. The option is ***View***.
Who Is In	Defines the user's access rights to the Who's In screen. The option is ***View***. For more information on the Who's In screen, see 146.
Utilities	This section defines the user's access rights to the **File, Utilities** menu's features. **NOTE:** Typically these are reserved for the system administrator.
Reindex, Repair, Update	Allows the user to Repair, Reindex and Update the Genesis Pro databases. For more information on these features, see the sections on ***Repairing*** (page 407), ***Reindexing*** (page 407) and ***Updating*** (page 408).
Set Reprocess Date	Allows the user to Set employees' Reprocess Date. For more information on this feature, see ***Set Reprocess Date***, page 413.

Setting	Definition
Fix Unassigned Badges	Allows the user to use the Fix Unassigned Badges utility. For more information on this feature, see ***Fix Unassigned Badges***, page 414.
Restore Original Reports	Allows the user to restore Genesis Pro original report definitions over modified reports. For more information on this feature, see ***Restore Original Reports***, page 415.
Repost from R-files	Allows the employee to repost R-files (polled clock data) to the Genesis Pro database. For more information on this feature, see ***Repost R-Files***, page 415.
Purge R-files	Allows the employee to delete old R-files (polled clock data) from the Genesis Pro directory. For more information on this feature, see ***Purge R-Files,*** page 416.
Archive and Restore	Allows the employee to Archive the Genesis Pro database and restore a previously archived database. For more information on these features, see ***Archive***, page 417.
System Backup	Allows the employee to Backup the Genesis Pro database. For more information on these features, see ***System Backup***, page 420.
System Restore	Allows the employee to Restore the Genesis Pro database from the backup.
Other	This section defines the user's access rights to the other items in the File menu'.
Import	Allows the employee to import data from external files. For more information on this feature, see ***Importing***, page 400.
Export	Allows the employee to export data from Genesis Pro to an external file. For more information on this feature, see ***Exporting***, page 404.
Print Setup	Allows the employee access to the print setup information from the **File** menu. See page 284.
Print Barcode	Allows the employee to Print Barcode list. For more information on this feature, see ***Print Barcode,*** page 410.

Setting	Definition
Check All	This option will activate all available features in the File window.
Uncheck All	This option will inactivate all available features in the File window.

4. The *Edit* tab grants access to features under the **Edit** menu and contains the following information:

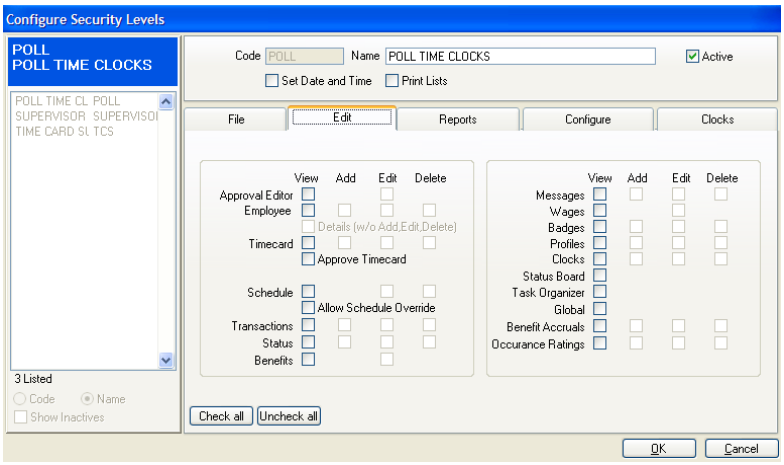


Figure 94: Security Levels: Edit tab

Setting	Definition
Approval Editor	Defines the user's access rights to the *Approval Editor*. The options are ***View*** and ***Edit***. For more information on this feature, see ***Approval Editor***, page 266.
Employee	Defines the user's access rights to the *Configure Employee* section. The options are ***View***, ***Add***, ***Edit*** and/or ***Delete*** and will allow the user access to employee records. *If **Add, Edit and Delete** are turned off the Detail Tab is also off.* For more information on this feature, see ***Employee Maintenance***, page 167.
Details (w/o Add, Edit, Delete)	Defines the user's access to the Details tab of the Configure Employee section. This is a view only feature, unless Add, Edit and Delete have been activated in the above (Employee) section.

Setting	Definition
Timecard	Defines the user's access rights to the *Timecard* tab of the *Configure Employee* section. The options are ***View***, ***Add***, ***Edit*** and/or ***Delete*** and will allow the user access to employee time sheet data. For more information on this feature, see ***Employee Timecard***, page 205.
Approve Timecard	Defines the user's access to approve timecards in the *Timecard* tab of the *Configure Employee* section.
Schedule	Defines the user's access rights to the *Schedule* tab of the *Configure Employee* section. The options are ***View***, ***Edit,*** and ***Delete*** and will allow the user access to the employee's schedule. For more information on this feature, see ***Employee Schedule***, page 211.
Allow Schedule Override	Defines the user's access to create new shifts as a shift override on the *Schedule* tab of the *Configure Employee* section.
Transactions	Defines the user's access rights to the *Transactions* tab of the *Configure Employee* section. The options are ***View***, ***Add***, ***Edit*** and/or ***Delete*** and will allow the user access to employee transaction (punch) data. For more information on this feature, see ***Employee Transactions***, page 220.
Status	Defines the user's access rights to the *Status* tab of the *Configure Employee* section. The options are ***View***, ***Add***, ***Edit*** and/or ***Delete***. For more information on this feature, see ***Employee Status***, page 221.
Benefits	Defines the user's access rights to the *Benefits* tab of the *Configure Employee* section. The options are ***View*** and ***Edit*** and allow the user access to the employee's benefits entitlement information. For more information on this feature, see ***Employee Benefits***, page 224.
Messages	Defines the user's access rights to the *Messages* tab of the *Configure Employee* section. The options are ***View***, ***Add***, ***Edit*** and/or ***Delete***. For more information on this feature, see ***Employee Messages***, page 231.

Setting	Definition
Wages	Defines the user's access rights to the *Wages* tab of the *Configure Employee* section. The options are ***View*** and ***Edit*** and will allow the user access to employee pay rate information. For more information on this feature, see ***Employee Wages***, page 234.
Badges	Defines the user's access rights to the *Badges* tab of the *Configure Employee* section. The options are ***View***, ***Add***, ***Edit*** and/or ***Delete***. For more information on this feature, see ***Employee Badges***, page 239.
Profiles	Defines the user's access rights to the *Profiles* tab of the *Configure Employee* section. The options are ***View***, ***Add***, ***Edit*** and/or ***Delete***. For more information on this feature, see ***Employee Profiles***, page 240.
Clocks	Defines the user's access rights to the *Clocks* tab of the *Configure Employee* section. The options are ***View***, ***Add***, ***Edit*** and/or ***Delete***. For more information on this feature, see ***Employee Clocks***, page 240.
Status Board	Allows the user to view the *Status Board* screen. For more information on this feature, see ***Status Board***, page 268.
Task Organizer	Allows the user to view the *Task Organizer* screen. For more information on this feature, see ***Task Organizer***, page 268.
Global	Allows the user access to the **File**, **Global** menu, from which he/she can perform global functions. For more information on this feature, see ***Global Commands***, page 272.
Benefits Accruals	Allows the user to access the **File**, **Benefits Accruals** menu. (Benefits Accruals are an optional feature and therefore may not be available here.) The options are ***View***, ***Add***, ***Edit*** and/or ***Delete***. For more information on this feature, see ***Benefits Accruals***, page 166.

Setting	Definition
Occurrence Ratings	Allows the user access to the **File, Occurrence Ratings** menu. (Occurrence Ratings are an optional feature and therefore may not be available here.) The options are ***View***, ***Add***, ***Edit*** and/or ***Delete***. For more information on this feature, see ***Occurrence Ratings***, page 166.
Check All	This option will activate all available features in the Edit window.
Uncheck All	This option will inactivate all available features in the Edit window.

5. The *Reports* tab grants access to features under the **Reports** menu and contains the following information:

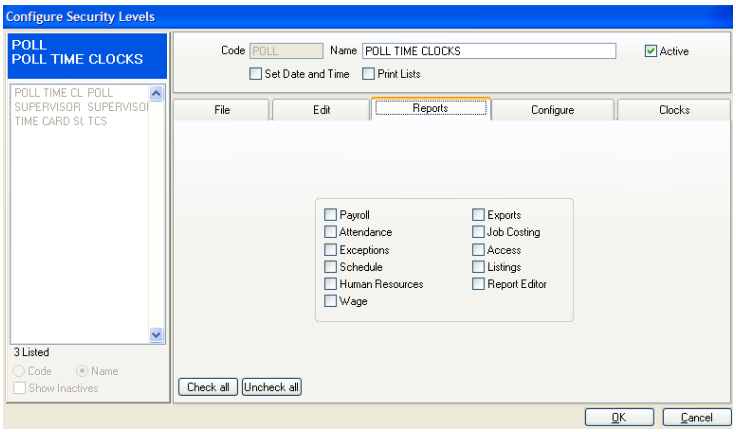


Figure 95: Security Levels: Reports tab

Setting	Definition
Payroll	Grants access to the reports in the ***Payroll*** category.
Attendance	Grants access to the reports in the ***Attendance*** category.
Exceptions	Grants access to the reports in the ***Exceptions*** category.
Schedule	Grants access to the reports in the ***Schedule*** category.
Human Resources	Grants access to the reports in the ***Human Resource*** category.
Wage	Grants access to the reports in the ***Wage*** category.
Exports	Grants access to the reports in the ***Exports*** category. **NOTE**: This is the category in which the payroll exports live.

Setting	Definition
Job Costing	Grants access to the reports in the ***Job Costing*** category.
Access	Grants access to the reports in the ***Access*** category.
Listings	Grants access to the reports in the ***Listings*** category. For more information see ***Listings,*** page
Report Editor	Grants access to the ***Report Editor***.
Check All	This option will activate all available features in the Reports window.
Uncheck All	This option will inactivate all available features in the Reports window.

6. The *Configure* tab grants access to features under the **Configure** menu and contains the following information:

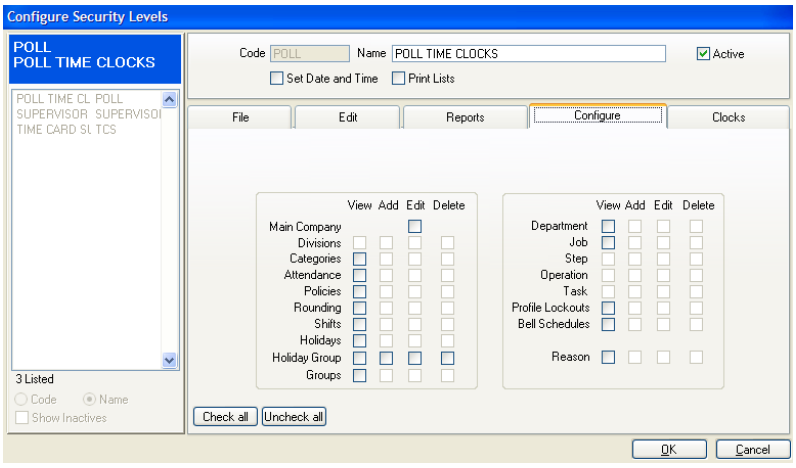


Figure 96: Security Levels: Configure tab

Setting	Definition
Main Company	Defines the user's access rights to the *Main Company* settings. The only option is ***Edit***. For more information on this feature, see ***Main Company***, page 28.
Divisions	Defines the user's access rights to *Divisions* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Divisions***, page 36.

Setting	Definition
Categories	Defines the user's access rights to *Categories* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Categories***, page 39.
Attendance	Defines the user's access rights to *Attendance* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Attendance Codes***, page 45.
Policies	Defines the user's access rights to *Policies* settings. The options are ***View***, ***Add*, *Edit*** and ***Delete***. For more information on this feature, see ***Policies***, page 48.
Rounding	Defines the user's access rights to *Rounding* rule settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Rounding***, page 65.
Shifts	Defines the user's access rights to *Shifts* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see **Shifts**, page 72.
Holidays	Defines the user's access rights to *Holidays* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Holidays***, page 83.
Holiday Groups	Defines the user's access rights to *Holiday Groups* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Holiday Groups***, page 83.
Groups	Defines the user's access rights to *Groups* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Groups***, page 85.
Department	Defines the user's access rights to *Department* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Departments***, page 92.

Setting	Definition
Job	Defines the user's access rights to *Job* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Configure Jobs***, page 97.
Step	Defines the user's access rights to *Step* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Configure Steps***, page 102.
Operation	Defines the user's access rights to *Operation* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Configure Operations***, page 107.
Task	Defines the user's access rights to *Task* settings. The options are ***View, Add, Edit*** and ***Delete.*** For more information on this feature, see ***Configure Tasks,*** page 112.
Profile Lockouts	Defines the user's access rights to *Profile Lockouts* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Profile Lockouts***, page 166.
Bell Schedules	Defines the user's access rights to *Bell Schedule* settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Bell Schedules***, page 165.
Reason	Defines the user's access rights to *Reason* settings. The options are ***View, Add, Edit*** and ***Delete***.
Check All	This option will activate all available features in the Configure window.
Uncheck All	This option will inactivate all available features in the Configure window.

7. The *Clocks* tab grants access to features under the **Clocks** menu and contains the following information:

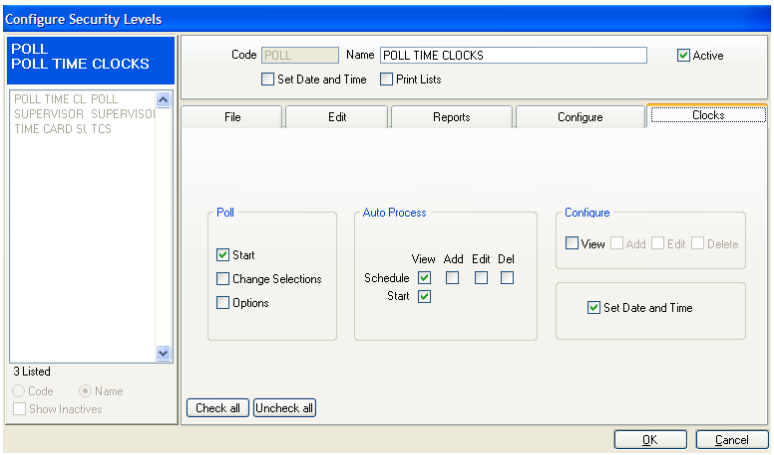


Figure 97: Security Levels: Clocks tab

Setting	Definition
Poll	This section defines the user's access rights to Poll hardware clocks.
Start	Allows the user to start the process of polling clocks. For more information on this feature, see ***Polling***, page 388.
Change Selections	Allows the user to manually change the times at which the clocks poll. For more information on this feature, see ***Polling***, page 388.
Options	Allows the user to change the settings in the *Poll Clock Selection* dialog box. For more information on this feature, see ***Polling***, page 388.
AutoProcess	This section defines the user's access rights to configure Auto Processes. For more information on this feature, see ***Configure an AutoProcess***, page 390.
Schedule	Defines the user's access rights to Schedule AutoProcess settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Configure an AutoProcess***, page 390.
Start	Allows the user to start a pre-defined AutoProcess. For more information on this feature, see ***Configure an AutoProcess***, page 390.

Setting	Definition
Configure	Defines the user's access rights to clock configuration settings. The options are ***View***, ***Add***, ***Edit*** and ***Delete***. For more information on this feature, see ***Terminal Configuration***, page 304.
Set Date and Time	Allows the user to set the date and time of the clocks.
Check All	This option will activate all available features in the Clocks window.
Uncheck All	This option will inactivate all available features in the Clocks window.

Add a Security Level

1. Click the **File** menu**, Security, Define Levels**. The *Configure Security Level* dialog box will open.
2. Click the **Add** button to add a new Security Level. The tabs will become available.

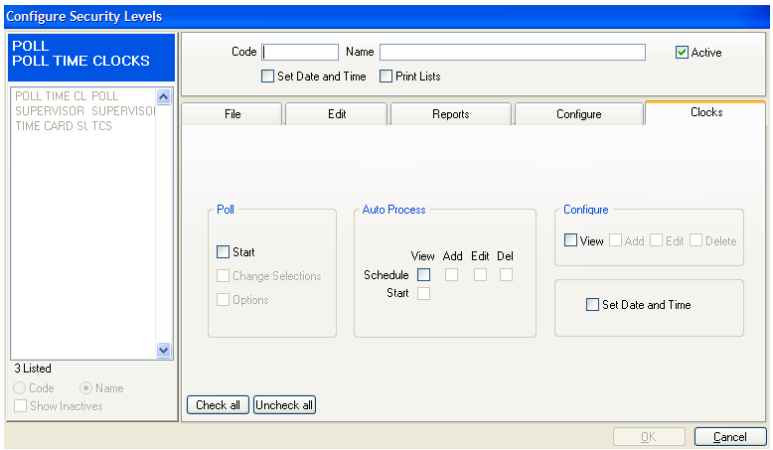


Figure 98: Adding a new Security Level

3. Fill in the settings as described in the *Configuring Security Levels* section.
4. Click **OK** to commit the changes and close the *Security Level* dialog box.
5. Click **Close** to exit the *Configure Security* Level dialog box.

Edit a Security Level

1. Click the **File** menu**, Security, Define Levels**. The *Configure Security Levels* dialog box will open.
2. Highlight the Security Level you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The tabs will become available for you to edit the selected Security Level.
   NOTE: You cannot edit the ***Code*** field.

4. Edit the settings as described in the *Configure Security Level* section.
5. Click **OK** to commit the changes and return to the *Configure Security Level* screen.
6. Click **Close** to exit the *Configure Security Level* dialog box.

Delete a Security Level

1. Click the **File** menu**, Security, Define Levels**. The *Configure Security Levels* dialog box will open.
2. Highlight the Security Level you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

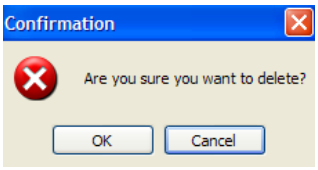


Figure 99: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Security Levels* dialog box.

User Maintenance

User Maintenance defines the users that can log in to Genesis Pro, which employees they can manage, and which areas of the program they can use. The user is given a login Id and password, is assigned a Security Level, and granted permission to select groups of employees.

NOTE: Define Levels must be completed before adding any users.

Configure Users

1. Click the **File** menu**, Security, User Maintenance**. The *Configure Users* window will open.

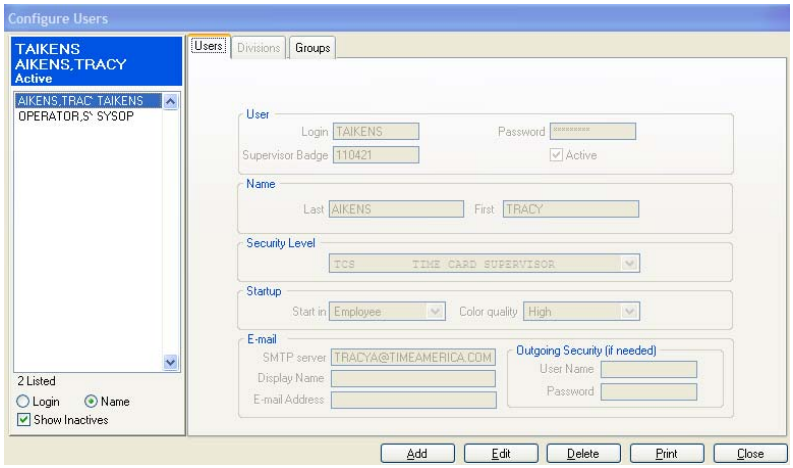


Figure 100: Configure Users

2. The *Configure Users* dialog box contains several tabs, each of which is described below.
3. The *Users* tab contains the following information:

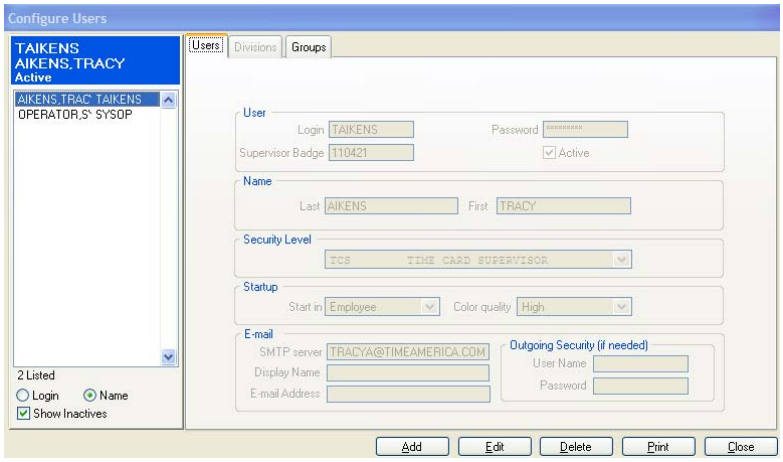


Figure 101: Configure Users: User tab

Setting	Definition
Login	This field is required. Enter a unique Login ID for this user, up to 9 alphanumeric characters. This code will be entered into the User ID field in the login window when this user logs in. Once saved, the Login name cannot be changed. When you press **Tab** or **Enter** after entering this field, the ***Password*** entry dialog box will appear automatically.
Password	This field is required. Enter a password, up to 9 alphanumeric characters, to be used with the User ID above. Type the password again to confirm it.

Supervisor Badge	Enter the badge number assigned to this user. For audit purposes, this badge number is recorded when this user adds or edits transactions.
Active	Click the Active check box to indicate that the Login ID is active. Uncheck this box if the Login is not being used at this time.
Last	Enter the last name of this User.
First	Enter the first name of this User.
Security Level	Select the pre-defined Security Level for this user. For more information on setting up Security Levels, see ***Configure Security Levels***, page 127.
Startup	This section determines the settings that apply when Genesis Pro starts up.
Start In	Select the screen that should open automatically when Genesis Pro starts. The options are ***Main Menu***, ***Approval Editor***, ***Employee*** (*Configure Employee*) and ***Task Organizer***.
Color Quality	Select the set of icons you want displayed in Genesis Pro. The options are ***High Quality and Low Quality***. High Quality displays the newest icons and Low Quality keeps the old icons.
Email Profile	Enter this user's email address. This can be used to send Auto Processed reports to the user whenever they're ready. **NOTE:** This option will only be available if you have activated the SMTP feature.
SMTP server	Enter the SMTP server name.
Display Name	Enter the display name.
E-mail Address	Enter the e-mail address.
Outgoing Security	Enter this information for email authentication.
User Name	Enter the user name.
Password	Enter the password.

4. The *Divisions* tab specifies the Divisions to which this user can view and contains the following information:

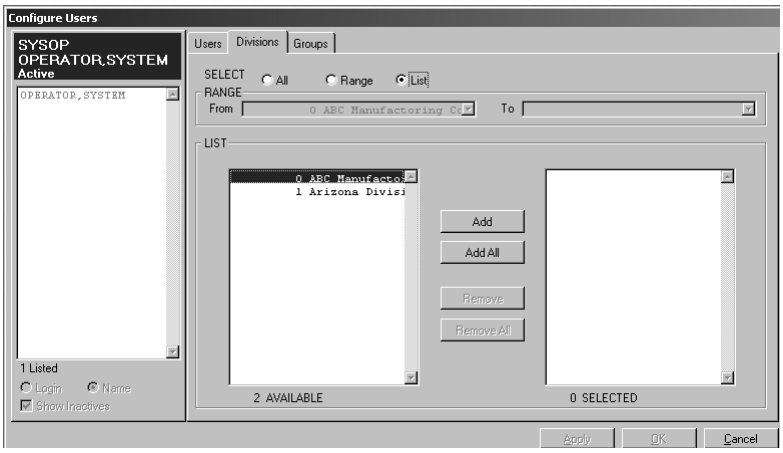


Figure 102: Configure Users: Divisions tab

Setting	Definition
Select	Determines what options are available in the bottom part of the screen. The options are ***All***, ***Range***, and ***List***. **All** automatically grants access to all Divisions. **Range** allows you to choose a range of Divisions for access. List allows you to choose individual **Divisions** for access.
List	When ***List*** is selected, a list of all the Divisions in your company will appear based on what was selected above.
Add/Add All	**Add** adds the currently selected Division to the ***Selected*** list. **Add All** adds all of the Divisions to the ***Selected*** list.
Remove/Remove All	**Remove** removes the currently selected Division from the ***Selected*** list. **Remove All** removes all of the Divisions from the ***Selected*** list.

5. The *Groups* tab specifies the Groups which this user can view and contains the following information:

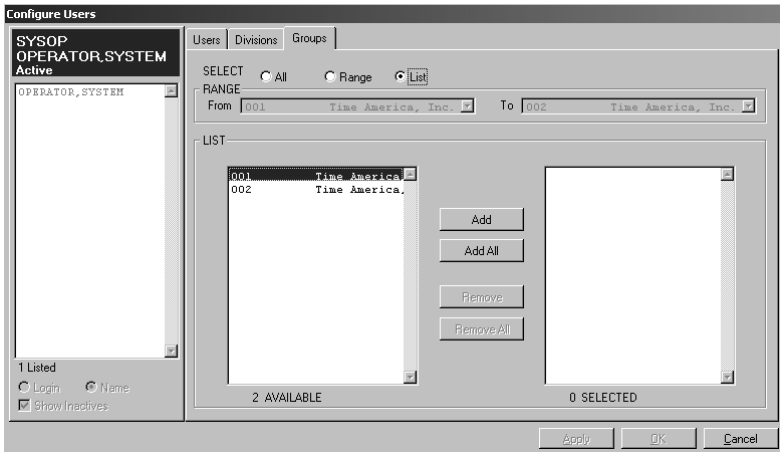


Figure 103: Configure Users: Groups tab

Setting	Definition
Select	Determines what options are available in the bottom part of the screen. The options are ***All***, ***Range***, and ***List***. **All** automatically grants access to all Groups. ***Range*** allows you to choose a range of Groups for access. List allows you to choose individual ***Groups*** for access.
List	When ***List*** is selected, a list of all the Groups in your company will appear based on what was selected above.
Add/Add All	**Add** adds the currently selected Group to the ***Selected*** list. **Add All** adds all of the Groups to the ***Selected*** list.
Remove/Remove All	**Remove** removes the currently selected Group from the ***Selected*** list. **Remove All** removes all of the Groups from the ***Selected*** list.

Add a User

1. Click the **File** menu**, Security, User Maintenance**. The *Configure Users* dialog box will open.
2. Click the **Add** button to add a new User. The *User* tab will become available.

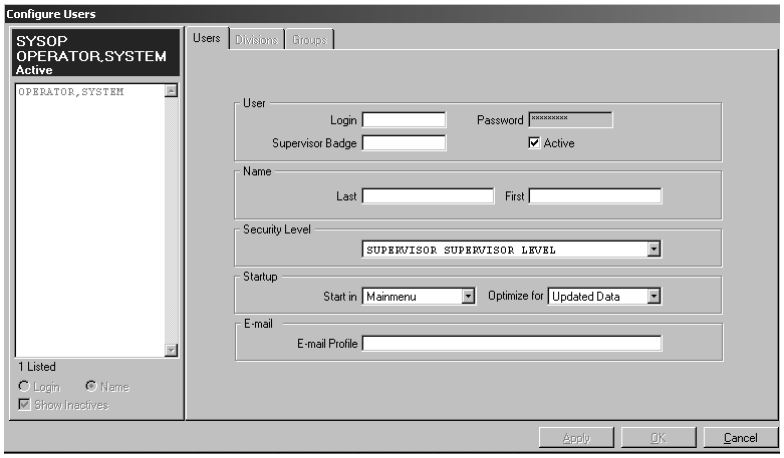


Figure 104: Adding a new User

3. Fill in the settings as described in the *Configure Users* section.
4. Click **Apply** to commit the changes.
5. Click on the **Divisions** tab.
6. Click **Apply** to commit the changes.
7. Click on the **Groups** tab.
8. Click **OK.**
9. Click **Close** to exit the *Configure Users* dialog box.

Edit a User

1. Click the **File** menu**, Security, User Maintenance**. The *Configure Users* dialog box will open.
2. Highlight the User you wish to edit from the list.
3. Click the **Edit** button. The tabs will become available for you to edit. **NOTE**: The ***Login*** field cannot be edited.
4. Edit the settings as described in the *Configure User* section.
5. Click **OK** to commit the changes and return to the *Configure User* screen.
6. Click **Close** to exit the *Configure User* dialog box.

Delete a User

1. Click the **File** menu**, Security, User Maintenance**. The *Configure Users* dialog box will open.
2. Highlight the User you wish to delete from the list.
3. Click the **Delete** button. You will be prompted:

Figure 105: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Users* dialog box.

Who's Logged In

The *Who's Logged In* screen displays the Login and name of all the users currently logged in to Genesis Pro. Refresh button is also available to update the screen.

1. Click the **File** menu**, Security, Who's Logged In**. The *Who's Logged In* screen will open. You may also print login activity by clicking *Print*.

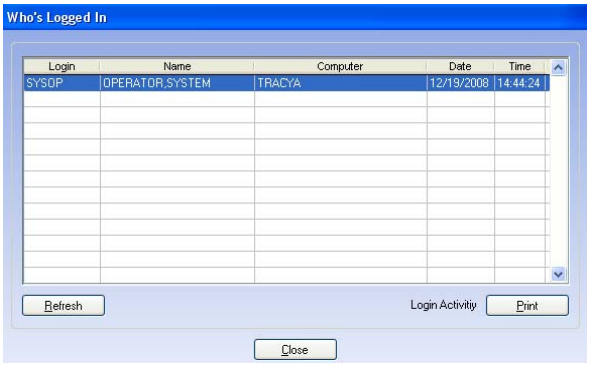


Figure 106: Who's Logged In

Change Password

The Change Password function changes the password of the user currently logged in.

1. Click the **File** menu**, Security, Change Password**. The *Change Password* input box will open.
2. Enter your old password.
3. Enter your new password. Type the password again to confirm it.
4. Click **OK** to confirm the changes and exit the dialog box.

Benefit Accruals

Using Benefit Accruals, Genesis Pro can automatically calculate the available benefit time for your employees. These calculations are based upon rules that can account for different benefit types (vacation, sick, personal, etc.), different accrual methods, seniority rules and other factors. Benefit time taken is automatically subtracted from the available benefits so that balances are always accurate.

Genesis Pro allows for an unlimited number of policies so that you can accommodate different situations within your company. Each policy contains accumulators that specify the category amounts and rules for earning benefits.

After the policies are created, they are assigned to the appropriate employees within the company.

NOTE: Benefit Accruals is an additional module added into Genesis Pro. If you did not purchase Benefit Accruals, you will have Benefit Entitlement instead. See ***Benefit Entitlement: Configure***, page 224.

There are two commands within the **Benefit Accruals** menu. Both are described below.

Figure 107: Benefit Accruals menu

Configure Benefit Accruals

1. Click the **Edit** menu**, Benefit Accruals, Configure**. The *Configure Benefit Accrual* window will open.

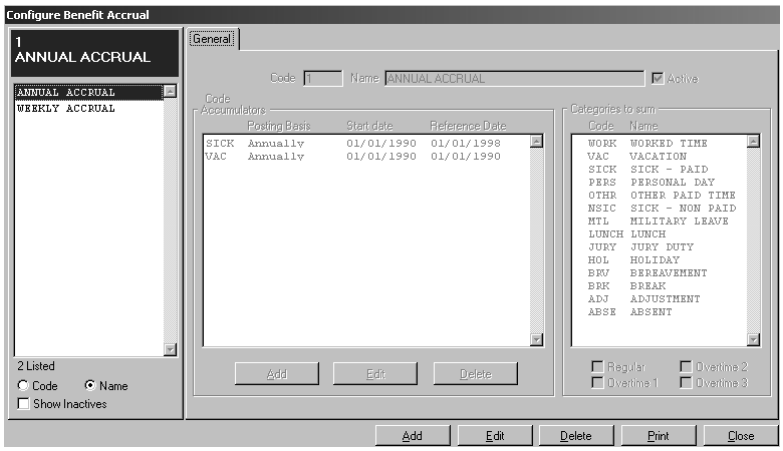


Figure 108: Benefit Accruals

2. The *Configure Benefit Accrual* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter the code or number you wish to use to refer to this Benefit Accrual policy. You may enter up to 3 characters.
Name	This is a required field. Enter the name you wish to use to refer to this Benefit Accrual policy. You may enter up to 30 characters.

Active	Click the Active check box to indicate that the policy is currently in use. Uncheck this box if the policy is not being used at this time.
Accumulators	Lists the accumulators that make up this Benefit Accrual policy. For more information on this feature see ***Benefit Accruals,*** page 146.
Code	Indicates the unique number assigned to the selected accumulator.
Posting Basis	Indicates the frequency with which benefits are posted in this accumulator.
Start Date	Indicates the date on which this policy became effective. **NOTE:** This is typically set to the start date of the company. However, this date needs to be no earlier than the start date of the employee that has the most seniority in the company.
Reference Date	Indicates the date on which the yearly benefits reset (previous balance zero out or roll forward, and the employee starts earning a new year's benefits.)
Categories to Sum	Indicates the categories that will be considered when calculating benefits based on hours worked and/or paid. Click the category to select it. A checkmark displays next to categories when they are selected.
Code	Displays the code for the Category.
Name	Displays the name of the Category.
Regular	Check this box to indicate that regular hours of the selected category(s) should be considered when calculating benefits.
Overtime	Check this box to indicate that overtime hours of the selected category(s) should be considered when calculating benefits.
Overtime 2	Check this box to indicate that overtime 2 hours of the selected category(s) should be considered when calculating benefits.
Overtime 3	Check this box to indicate that overtime 3 hours of the selected category(s) should be considered when calculating benefits.

Configure Benefit Accumulators

Accumulators specify the categories that will be granted by the policy, as well as the amounts granted and method of accrual. You can have multiple accumulators within one policy.

1. While adding or editing a Benefit Accrual, click the **Add** or **Edit** button in the center of the screen to display the *Accumulators* dialog box.

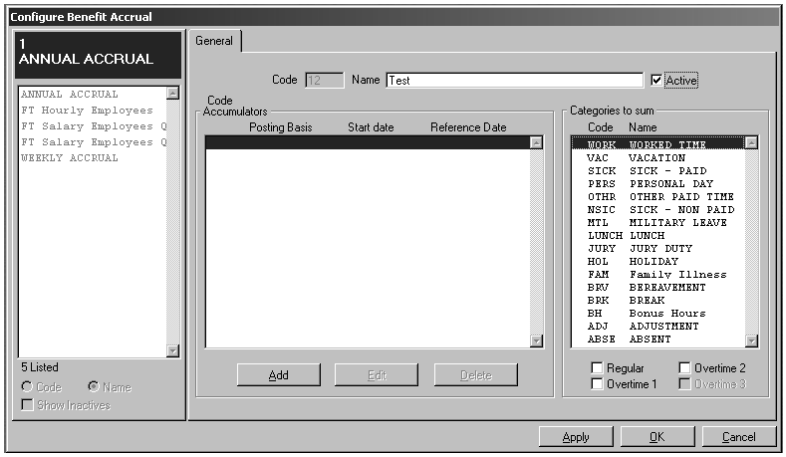


Figure 109: Adding a Benefit Accumulator

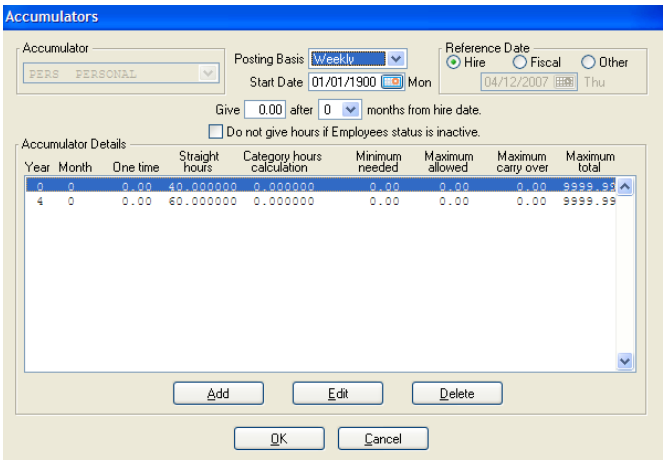


Figure 110: Benefit Accumulators

2. The *Accumulators* dialog box contains the following information:

Setting	Definition
Accumulator	Select the category for this rule. Only the categories that have been selected for benefit entitlement will display in this drop-down box. To select a category for benefit entitlement, edit the Category in Configure, Categories and check the ***Post to benefit entitlement*** box. For more information, see ***Categories***, page 39.
Posting Basis	Select how often you want benefits to be posted. The options are: • Weekly • Biweekly • Semimonthly • Monthly • Annually • Daily The benefits are posted at the end of the posting period.
Start Date	Pick the date for the policy to take effect. Pick a date in the past so that the defined rules can be met for all current employees.
Reference Date	This date indicates the rollover or reset date for employee benefits. The options are: • **Hire**: this benefit resets on the employee's individual hire date (set in Employee Maintenance). • **Fiscal**: this benefit resets on the employee's individual fiscal date (set in Employee Maintenance). • **Other**: this benefit resets on this date for all employees. For example, January 1.
Give XX after X months from hire	This setting enables you to grant a lump sum benefit a certain number of months from the employees hire date. For example, "Give 40 hours after 6 months from hire date" to automatically give an employee a week's vacation on his/her six-month anniversary.
Do not give hours if Employee status is inactive	This setting will not grant employee hours if the employee status is inactive.

Accumulator Details	This section displays the details for accumulating or accruing the category selected. There can be multiple accumulator details for one category. The Accumulator section displays the rules for details already added. To display the entry screen for an Accumulator, click the **Add** button.
Year	This is a required field. Enter the number of years of service after which this rule takes effect. To have the rule start immediately, select 0. Works in conjunction with the months.
Month	This is a required field. Enter the number of months of service after which this rule takes effect. To have the rule start immediately, select 0. Works in conjunction with the years.
One Time	This setting allows you to grant a one-time benefit of this category. This field is optional. For example, you might want to give a "length of service" bonus of 40 hours on the employee's anniversary, in addition to their regular accruals. This benefit occurs only once: it does not recur each year.
Straight Given Hours (at end)	This setting allows you to enter a set number of hours granted at the end of the Posting Basis period (weekly, biweekly, etc.) This field is optional For example, to grant 8 hours of time per month, you would choose Monthly for the Posting Basis and enter 8 in this box.
Hours from Categories to sum X	This setting allows you to enter the fraction of benefits earned for hours worked and/or paid. Genesis Pro will calculate the number of hours paid of the categories selected in the Categories to Sum section of the Benefit Accrual dialog box. It will multiply the number of hours paid by the number entered here to calculate the available benefits, as follows: Category Hours **X** Factor = Accrued Benefit
Minimum Hours Needed	Enter the minimum hours required to be worked in the Posting Basis period for the employee to be eligible for any benefits accrual. For example, this could be used to pay benefits only if the employee works more than 30 hours per week.

Maximum Hours Allowed	Enter the maximum hours that can be accumulated for this category during the Posting Basis period. This is used to keep employees who work lots of hours from accruing more benefits than they are entitled to.
Maximum Annual Carry Over	Enter the number of hours the employee can carry forward into the next benefit year (on the Reference Date). For no carry over ("use it or lose it"), enter 0.
Maximum Total Benefit Hours	Enter the maximum number of hours the employee is allowed to accrue during the benefit year. For example, this could be used to "cap" accruals at a maximum amount.

Add a Benefit Accruals Policy

1. Click the **Edit** menu**, Benefit Accruals, Configure**. The *Configure Benefit Accrual* dialog box will open.
2. Click the **Add** button to add a new Benefit Accruals policy. The *General* tab will become available.

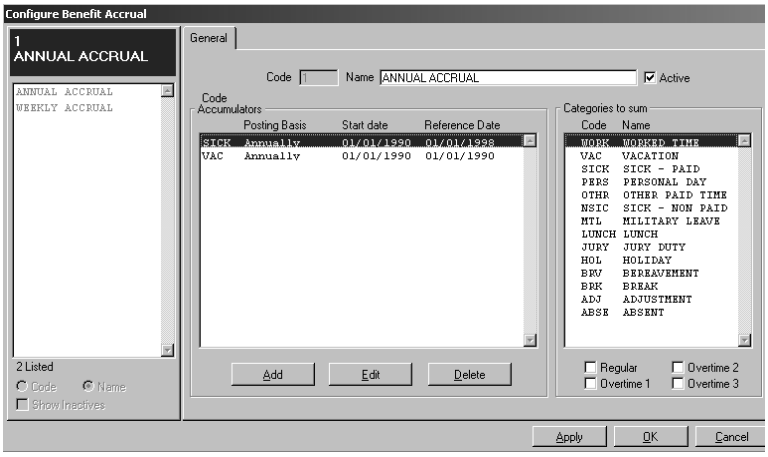


Figure 111: Adding a new Benefit Accruals policy

3. Fill in the **Code** and **Name** fields as described in the *Configuring Benefit Accruals* section.
4. Click the **Add** button to display the *Accumulator* dialog box.

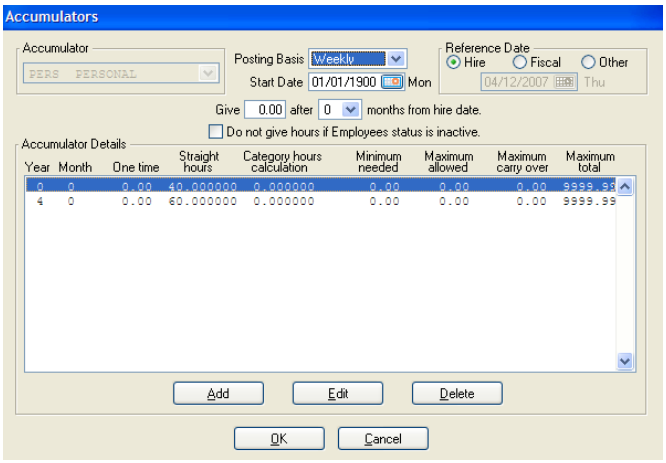


Figure 112: Adding a new Benefit Accrual Accumulator

5. Fill in the settings as described in the *Configure Benefit Accumulators* section.
6. Click the **Add** button to display the *Accumulator Details* dialog box.

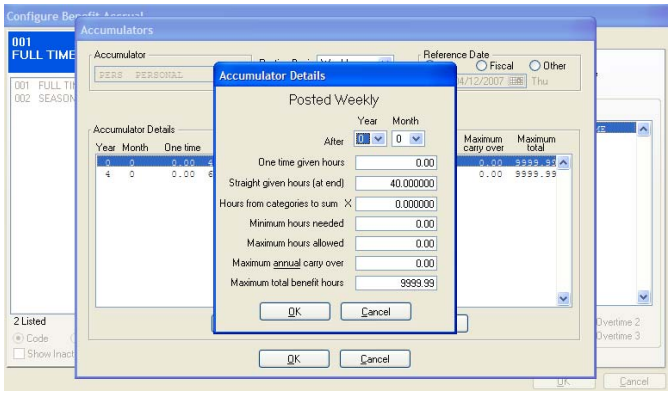


Figure 113:Adding Accumulator Details

7. Fill in the **Accumulator Detail** settings as described in the *Configure Benefit Accumulators* section.
8. Click **OK** to accept the details and return to the *Accumulator* screen.
9. Repeat steps 6 through 8 for each unique accumulator details needed.
10. Click **OK** to accept the Accumulator and return to the *Benefit Accruals* screen.
11. Repeat steps 4 through 10 for each unique Accumulator (Category) needed.
12. Click **OK** to commit the changes and close the *Configure Benefit Accruals* dialog box.
13. Click **Close** to exit the *Configure Benefit Accruals* dialog box.

Edit a Benefit Accruals Policy

1. Click the **Edit** menu**, Benefit Accruals, Configure**. The *Configure Benefit Accrual* dialog box will open.
2. Highlight the Benefit Accrual policy you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Benefit Accrual policy.
4. Edit the settings as described in the *Configure Benefit Accruals* section.
5. Once you are editing the Benefit Accrual, you can further edit the Accumulator and Accumulator Details.

   To edit the Accumulator, click the **Edit** button in the Accumulator section in the center of the screen.

   To edit the Accumulator Details, first click the **Edit** button on the Benefit Accrual screen, then click the **Edit** button in the Accumulator screen.
6. Click **OK** as many times as necessary to commit the changes and return to the *Configure Benefit Accrual* screen.
7. Click **Close** to exit the *Configure Benefit Accrual* dialog box.

Delete a Benefit Accruals policy

Benefit Accruals that are in use cannot be deleted.

1. Click the **Edit** menu**, Benefit Accruals**. The *Configure Benefit Accruals* dialog box will open.
2. Highlight the Benefit Accruals policy you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 114: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Benefit Accruals* dialog box.

Update to Current

This command causes Genesis Pro to calculate all employees' benefit accruals up to the current date.

1. Click the **Edit** menu**, Benefit Accruals, Update to Current**. Genesis Pro will automatically update employee benefits.

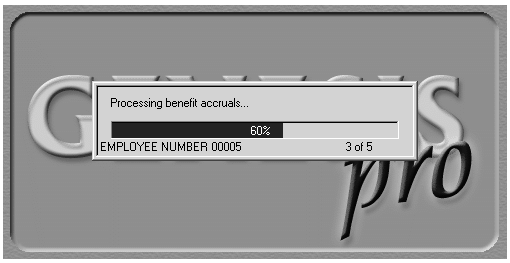


Figure 115: Benefit Accruals: Update to Current

Occurrence Ratings

Occurrence Ratings is an optional module that allows you to track an employee's attendance infractions, report on them, and send disciplinary notices when a specified number of infractions have been recorded. Occurrence Notices can also be generated when less than 0. Occurrence Ratings are assigned to the employees that are affected by them.

It is possible to define which attendance codes count as infractions, how many infractions are considered an occurrence, and how many occurrences may be recorded before the disciplinary notice is generated.

There are two commands within the Occurrence Ratings menu, both of which are described below.

Figure 116: Occurrence Ratings menu

Configure Occurrence Ratings

1. Click the **Edit** menu**, Occurrence Ratings, Configure**. The *Configure Occurrences* window will open.

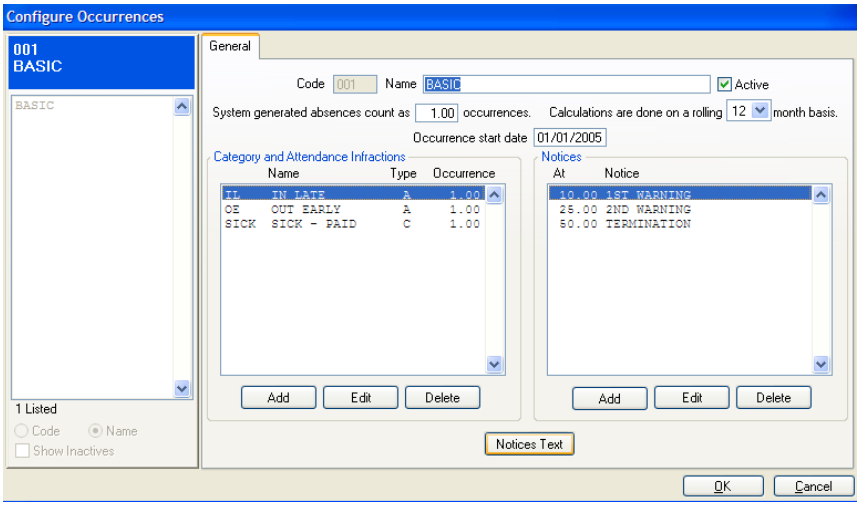


Figure 117: Occurrence Ratings

2. The *Configure Occurrences* dialog box contains the following information:

Setting	Definition
Code	This is a required field. Enter a code to identify this Occurrence Rating. You may enter up to 3 characters.
Name	This is a required field. Enter the name for this Occurrence Rating. You may enter up to 30 characters.
Active	Click the Active check box to indicate that the rating is currently in use. Uncheck this box if the rating is not being used at this time.
System Generated absences count as X occurrences	Enter the number of occurrences to record for system-generated absences. System Generated Absences happen automatically when an employee is scheduled to work but does not punch, and no miscellaneous entries are entered to override the absence.
Calculations are done on a rolling X month basis	Enter the number of months in the occurrence tracking cycle.
Occurrence Start Date	Effective start date of the policy.
Category and Attendance Infractions	This section displays the infractions that are to be flagged as occurrences and their details.
Code	Displays the Category or Attendance code for this infraction.
Name	Displays the Category or Attendance name for this infraction.

Type	Displays a **C** for Category or an **A** for Attendance.
Occurrence	Displays the percentage of an occurrence this infractions counts as.
Notices	This section displays the titles of the notices that are to be sent. Notices are sent when a certain number of occurrences are met.
At	Displays the number of occurrences after which the notice should be sent.
Notice	Displays the title of the notice.
Notices Text	Allows you to customize the text of the Attendance Notice.

Add an Occurrence Rating

1. Click the **Edit** menu**, Occurrence Ratings, Configure**. The *Configure Occurrences* dialog box will open.
2. Click the **Add** button to add a new Occurrence Rating. The *General* tab will become available.

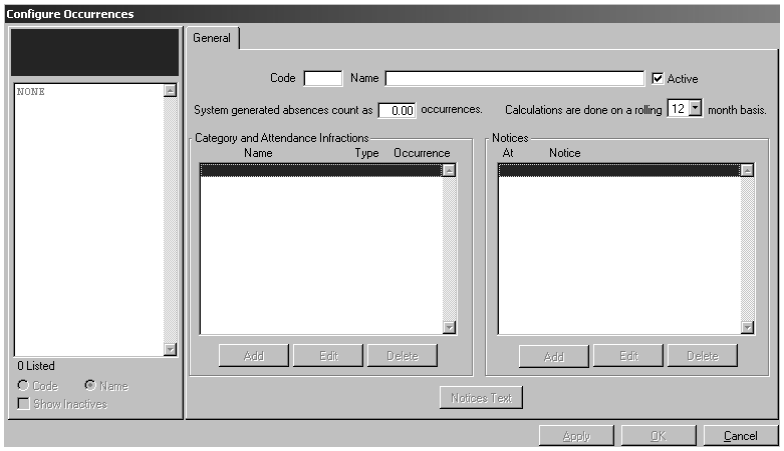


Figure 118: Adding a new Occurrence Rating

3. Fill in the settings as described in the *Configuring Occurrence Ratings* section.
4. Click the **Add** button in the Category and Attendance Infractions section to configure the rules as described in the Configure Category and Attendance Infractions section.
5. Click the **Add** button in the Notices section to configure the notices as described in the *Configure Attendance Notices* section.
6. Click **OK** to commit the changes and return to the *Configure Occurrences* dialog box.
7. Click **Close** to exit the *Configure Occurrences* dialog box.

Edit an Occurrence Rating

1. Click the **Edit** menu**, Occurrence Ratings, Configure**. The *Configure Occurrences* dialog box will open.
2. Highlight the Occurrence Rating you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected Occurrence Rating.
4. Edit the settings as described in the *Configure Occurrence Rating, Configure Category and Attendance Infractions,* and *Configure Attendance Notices* sections.
5. Click **OK** to commit the changes and return to the *Configure Occurrences* screen.
6. Click **Close** to exit the *Configure Occurrences* dialog box.

Delete a Occurrence Rating

Occurrence Ratings that are in use cannot be deleted.

1. Click the **Edit** menu**, Occurrence Ratings, Configure**. The *Configure Occurrences* dialog box will open.
2. Highlight the Occurrence Rating you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 119: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Occurrences* dialog box.

Add Category and Attendance Infractions

After adding an Occurrence Rating, you will define the Categories and Attendance infractions that count toward the Attendance Notices.

1. From the *Configure Occurrences* dialog box, click the **Add** button in the Category and Attendance Infractions section. The *Infraction* dialog box will open.

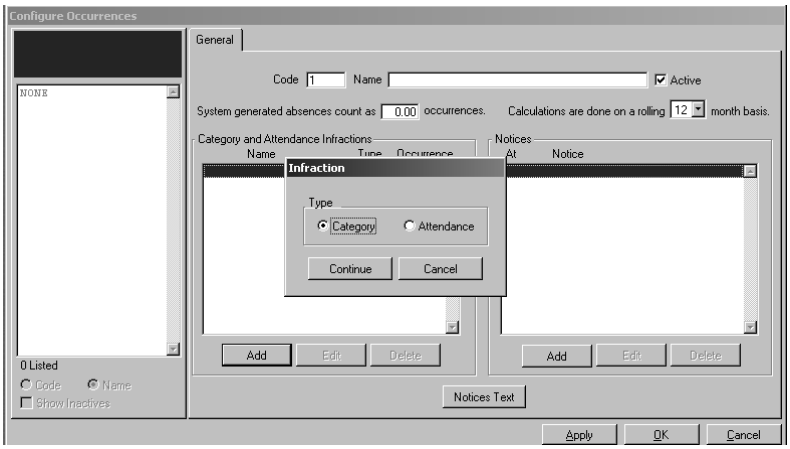


Figure 120: Infraction selection

2. Select ***Category*** or ***Attendance***.
3. Click **OK** to continue. The *Infraction Details* dialog box will open.

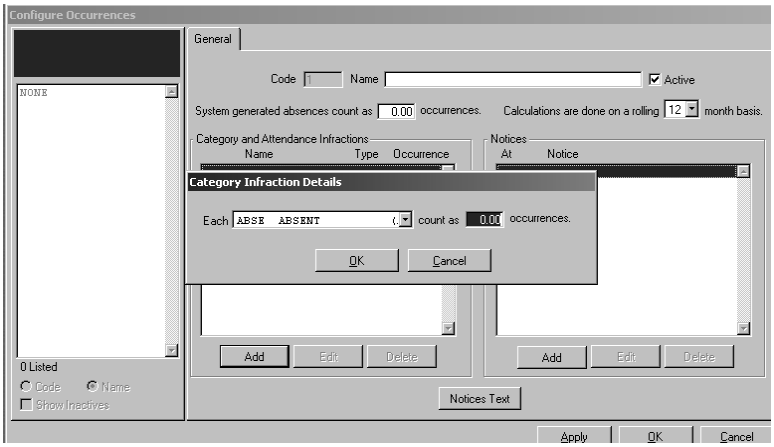


Figure 121: Infraction Details

4. The *Infraction Details* dialog box contains the following information:

Setting	Definition
Each	Select the Category or Attendance code for which you are adding details. You will be given different lists of pre-defined Categories and Attendance codes based upon your choice in the Infractions dialog box.
Occurrences	Enter the number (or percentage) of occurrences this infraction will count as.

5. Click **OK** to commit the changes and return to the Configure *Occurrences* screen.

Edit a Category and Attendance Infraction

1. Click the **Edit** menu**, Occurrence Ratings, Configure**. The *Configure Occurrences* window will open.
2. Highlight the Occurrence Rating you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* tab will become available.
4. Click the **Edit** button in the Category and Attendance Infractions section. The Infraction dialog box will open.
5. Edit the settings as described in the *Add Category and Attendance Infractions* section.
6. Click **OK** to commit the changes and return to the *Configure Occurrences* dialog box.
7. Click **Close** to exit the dialog box.

Delete a Category and Attendance Infraction

1. Click the **Edit** menu**, Occurrence Ratings, Configure**. The *Configure Occurrences* window will open.
2. Highlight the Occurrence Rating you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* tab will become available.
4. Click the **Delete** button in the Category and Attendance Infractions section. You will be prompted:

Figure 122: Deletion Confirmation

5. Click **OK** to confirm the deletion.
6. Click **Close** to exit the dialog box.

Add Attendance Notices

After adding an Occurrence Rating, you will define the Notices and when they should be sent. The Attendance Notice prints a standard text, which can be customized. You also have the option of printing the dates and circumstances of the applicable occurrences.

1. From the *Configure Occurrences* dialog box, click the **Add** button in the Notices section. The *Notice Details* dialog box will open.

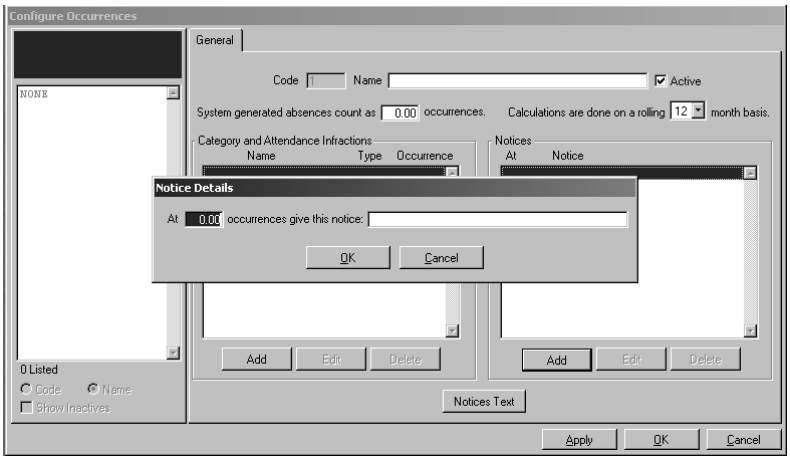


Figure 123: Notice Details

2. The *Notice Details* dialog box contains the following information:

Setting	Definition
Occurrences	Enter the number of occurrences after which this notice should be sent.
Notice	Enter the title or name you wish to use to refer to this notice. This will be printed at the top of the Attendance Notice.

3. Click **OK** to commit the changes and return to the *Configure Occurrences* screen.
4. To customize the text of the Notice, click **Notices Text** button. The *Notices Text* window will open.

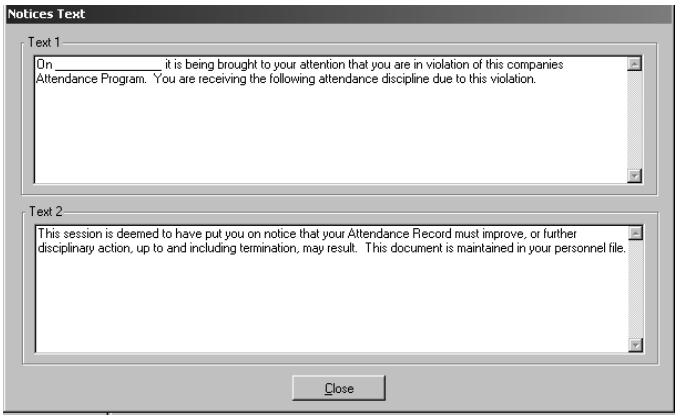


Figure 124: Notices Text

5. Modify the text of the notice as desired. Genesis Pro will automatically fill in the current date in the underlined section when printing the notice.
6. Click **Close** to commit the changes and return to the *Configure Occurrences* screen.

Edit an Attendance Notice

1. Click the **Edit** menu**, Occurrence Ratings, Configure**. The *Configure Occurrences* window will open.
2. Highlight the Occurrence Rating you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* tab will become available.
4. Click the **Edit** button in the Notices section. The *Notice Details* dialog box will open.
5. Edit the settings as described in the *Add Attendance Notice* section.
6. Click **OK** to commit the changes and return to the *Configure Occurrences* dialog box.
7. Click **Close** to exit the dialog box.

Delete a Category and Attendance Infraction

1. Click the **Edit** menu**, Occurrence Ratings, Configure**. The *Configure Occurrences* window will open.
2. Highlight the Occurrence Rating you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *General* tab will become available.
4. Click the **Delete** button in the Notices section. You will be prompted:

Figure 125: Deletion Confirmation

5. Click **OK** to confirm the deletion.
6. Click **Close** to exit the dialog box.

Printing and Viewing Attendance Notices

The Attendance Notice command allows you to preview and print Attendance Notices for all employees that have outstanding infractions. There are two reports available with this feature:

- **Attendance Notice**: prints the Notices text configured in the Configure Occurrences dialog box.
- **Attendance Detail**: prints the infractions that led to the Attendance Notice.

The employee list will appear automatically and will reflect those employees that are assigned to the Occurrence Rating and have met or exceeded the Attendance Notice limits.

1. Click the **Edit** menu**, Occurrence Ratings, Attendance Notices**. The *Attendance Notices* dialog box will open.

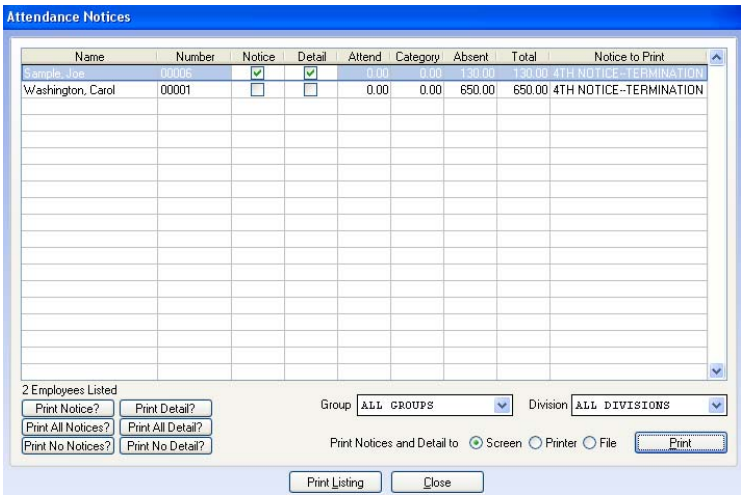


Figure 126: Attendance Notices

2. The *Attendance Notices* dialog box contains the following information:

Setting	Definition
Name	Displays the name of the employee receiving the notice.
Number	Displays the Employee Number of the employee receiving the notice.
Notice	Stands for ***Print Notice*** and indicates that the Attendance Notice report will preview and print for the specific employees selected.
Detail	Stands for ***Print Details*** and indicates that the Attendance Details report will print for the specific employees selected.
Attend	Displays the number of Attendance Infractions this employee has.
Category	Displays the number of Category Infractions this employee has.
Absent	Displays the number of Absences this employee has.
Total	Displays the total number of Occurrences this employee has.
Notice to Print	Displays, which notice, will be printed.
Print Notice?	This button works as a toggle. Click this button to select Print Notice in the upper screen. Click it again to deselect Print Notice.
Print All Notices?	Click this button to select Print Notice in the upper screen.
Print No Notices?	Click this button to select Print Notice in the upper screen.

Print Detail?	This button works as a toggle. Click this button to select Print Detail in the upper screen. Click it again to deselect Print Detail.
Print All Detai?	Click this button to select Print Detail in the upper screen.
Print No Detail?	Click this button to select Print Detail in the upper screen.
Group	Select this option to display a specific Group.
Division	Select this option to display a specific Division.
Screen	Outputs the report to screen first.
Printer	Sends the report directly to the printer.
File	The report can be saved as a file.

Chapter V Optional Modules

This section reviews the optional modules that are available with Genesis Pro. These modules are purchased in addition to Genesis Pro and may require separate installations. These modules are as follows:

- Job Costing
- Profile Lockouts
- Bell Schedules
- Benefits Accruals
- Occurrence Ratings
- PC Clock
- WebClock
- Videx DuraTrax
- Employee Reviewer
- Third Party Terminals

Job Costing

NOTE: The optional Job Costing Module includes Step, Operation and Task.

The Job Costing module is used to further track employee time and labor costs by job or project, both in terms of hours and money. Five levels of job costing are available: by default these are called Department, Job, Step, Operation, and Task. Departments are divided into Jobs, Jobs are divided into Steps, Steps are divided into Operations, and Operations are further divided into Tasks. You may use one or all of these levels, depending upon your needs. Each item can be assigned an hourly wage and/or a piece rate. For more information, see ***Job Costing,*** page 91.

NOTE: You will not be able to use Job without Department, Step without Job, Operation without Step, Task without Operation.

Bell Schedules

The Bell Schedules module allows your time clock to activate a bell at specified times of day. For example, you might have a bell ring to announce the start of a shift, break or lunch, and the end of the day. The bell schedule is defined by the day of the week, the time of day, and the duration of the bell. The bell schedules module can ring up to 336 bells per Time clock per week.

Each bell schedule template can contain multiple bell details. Once the Bell Schedule has been created, you will add the individual dates and times the bells will ring. The Bell Schedule is then downloaded to the appropriate time clocks. For more information, see ***Bell Schedules,*** page 117.

Profile Lockouts

The Profile Lockouts module controls when an employee can punch at a time clock. Employees can be given a lockout or a warning message when trying to punch In or Out at times that are restricted. Employees who are locked out are not permitted to complete their transaction but may have a supervisor punch them in by overriding the lockout.

You can also use the Profile Lockouts to send messages at certain times. For example, if you want to alert employees that they are clocking in too early, you could create a Profile Schedule with a "Too Early" message that displays when the employee clocks during certain hours of the day.

Lockout profiles are made up of Profile Schedules, which can contain up to 8 different time frames, each with its lockout and/or message. Each Profile Schedule specifies the time frames during which the lockout and/or message will display. There are 15 Profile Schedules are available, and 17 different lockout/messages are available.

After the lockout profile is complete, it is downloaded to the time clocks at which the profile will apply. Employees are assigned to the clocks and are assigned a profile schedule for each day of the week. For more information, see ***Profile Lockouts,*** page 121.

Benefit Accruals

Using Benefit Accruals, Genesis Pro can automatically calculate the available benefit time for your employees. These calculations are based upon rules that can account for different benefit types (vacation, sick, personal, etc.), different accrual methods, seniority rules and other factors. Benefit time taken is automatically subtracted from the available benefits so that balances are always accurate.

Genesis Pro allows for an unlimited number of policies so that you can accommodate different situations within your company. Each policy contains Accumulators, which specify the Categories, amounts and rules for earning benefits.

After the policies are created, they are assigned to appropriate employees within the company. For more information, see ***Benefit Accruals,*** page 146.

NOTE: Benefit Accruals is an additional module added into Genesis Pro. If you did not purchase Benefit Accruals, you will have Benefit Entitlement instead. See ***Benefit Entitlement: Configure***, page 224.

Occurrence Ratings

Occurrence Ratings is an optional module that allows you to track an employee's attendance infractions, report on them, and send disciplinary notices when a specified number of infractions have been recorded. Occurrence Ratings are assigned to the employees that are affected by them.

It is possible to define which attendance codes count as infractions, how many infractions are considered an occurrence, and how many occurrences may be recorded before the disciplinary notice is generated. For more information, see ***Occurrence Rating,*** page 155.

PC Clock

PC Clock is an optional module that may be installed on anyone's workstation and allows employees to clock in and out for the day, to lunch, and to breaks from their workstation. Employees may also use PC Clock to transfer departments or jobs and change their own passwords. PC Time Clock is perfect in situations where hardware data collection systems can't be cost-justified, or where hardware time clocks don't match into your organization's environment. For more information, see ***PC Clock,*** page 321.

WebClock

WebClock is an optional module that may be installed in addition to other hardware or as a stand-alone solution. Employees may use WebClock like any other clock except it works without badges thru a web browser. WebClock makes it easy to gather time from thousands of users in every corner of your enterprise, either across the building or across the country.

NOTE: The TimeSheet Submittal portion of WebClock only permits up to 3 levels of Job Costing to be entered or transferred.

For more information, see ***WebClock,*** page 342.

Videx DuraTrax

The DuraTrax can record employee routes, time, and monitor productivity for a multitude of industries including Security, Manufacturing, Retail, Hospitals and Healthcare. The Duratrax can have multiple configurations ranging from a simple route to complex route and issue tracking. DuraTrax is a contact bar code and Touch Memory button reader. DuraTrax brings you the latest in highly functional portables. For more information see ***Videx DuraTrax,*** page 382.

Third Party Terminals

Third Party Terminals is an optional module that allows the use of Biometric Hand Readers, ATS series clocks, and biometric fingerprint readers. For more information see, ***Hand Readers,*** page 362***,*** and see ***ATS,*** page 357.

Chapter VI Additional Employee Features

This section reviews the additional Employee Features that are available with Genesis Pro. This section includes the following:

- Employee Reviewer
- Time Sheets

Employee Reviewer

The Employee Reviewer is an optional module that allows the employees to view the timecard tab, schedule tab, transactions tab and benefit tab. Exempt (salary) employees can also submit online electronic times sheets. This is a view only module that will not allow the employee to make any changes to their punch, schedule, or benefit information, however they will be able to change their password.

Accessing Employee Reviewer

1. Click the **Start** button on your PC.
2. Highlight **Programs,** then **Genesis Pro,** then click **Employee Reviewer.**
3. Enter your Login ID (employee number) and Password.
   NOTE: The first time that you access the Employee Reviewer you will not have a password to enter.

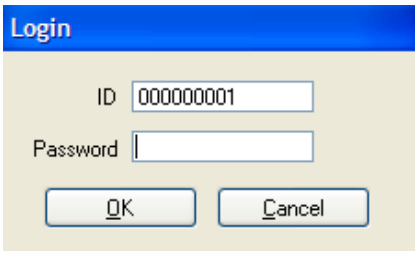


Figure 127: Employee Reviewer: Login Screen

4. Click **OK.**

Employee Timecard Tab

The *Timecard* tab displays the employee's timesheet information.

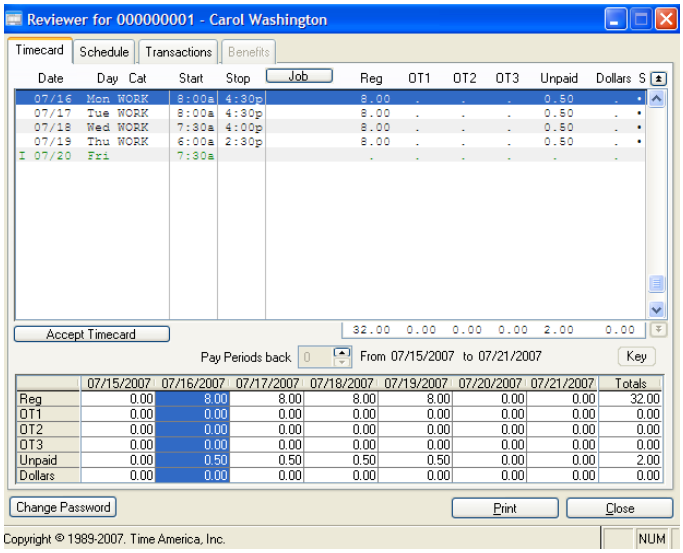


Figure 128: Employee Reviewer: Timecard tab

1. Navigate to the *Employee Reviewer* window. See ***Accessing Employee Reviewer***, page 168.
2. When you first enter the *Employee Reviewer* window, the *Timecard* tab is selected automatically and contains the following information:

Setting	Definition

Setting	Definition
Attendance Code	This field is **not** labeled. It displays a code to indicate an exception regarding the entry. The options are: • **A**: Indicates a system-generated absence. This entry will display in Red. • **M**: Indicates a missing punch. This entry will display in purple. • **I**: Indicates a work period In Progress. This entry will display in green. • **D**: Indicates a default work entry was added when the employee missed a punch (as defined in the Policy associated with this employee.) • **F**: Indicates that the entry was created when Genesis Pro forecasted the employee's hours. Time forecasting will display future time transactions (based on the employee's current schedule) on screen and in reports. • **S**: Indicates Genesis Pro has automatically created a Holiday entry. This entry will display in black.
Date	Displays the date of the entry.
Day	Displays a three-character code for the day of the week of the entry.
Cat	Displays the category associated with the entry (i.e., Work, Lunch, Break, Vacation, Sick, Absent, etc.)
Start	Displays the start time of the entry (i.e., the time at which the employee clocked in for the day, started lunch, etc.).
Stop	Displays the stop time of the entry (i.e., the time at which the employee clocked out for the day, ended lunch, etc.).
Department	By default, this field displays the Department the employee worked in. By clicking the **Department** button in the field header, you can choose to display the Job, Step, Operation, or Task (if applicable). Each time you click the button; it advances to the next item in order (Department, Job, Step, Operation, Task), eventually returning to Department.

Setting	Definition
Reg.	Displays the number of hours at straight time the employee will be paid for this entry. This number is calculated using the ***Start*** and ***Stop*** times, adjusted according to the Rounding, Lunch and Break policies defined in the Shift Group assigned to this employee.
OT1	Displays the number of hours at OT1 the employee will be paid for this entry, if any. This number is calculated using the ***Start*** and ***Stop*** times, adjusted according to the Rounding, Lunch and Break rules defined in the Shift Group assigned to this employee, as well as the Overtime rules defined in the Policy assigned to this employee.
OT2	Displays the number of hours at OT2 the employee will be paid for this entry, if any. This number is calculated using the ***Start*** and ***Stop*** times, adjusted according to the Rounding, Lunch and Break rules defined in the Shift Group assigned to this employee, as well as the Overtime rules defined in the Policy assigned to this employee
OT3	Displays the number of hours at OT3 the employee will be paid for this entry, if any. This number is calculated using the ***Start*** and ***Stop*** times, adjusted according to the Rounding, Lunch and Break rules defined in the Shift Group assigned to this employee, as well as the Overtime rules defined in the Policy assigned to this employee
Unpaid	Displays the number of unpaid hours for this entry, if any. Unpaid lunches and breaks will be reflected in this column, if appropriate.
Dollars	Displays the amount earned for this entry.
Accept Timecard	Employees may click this feature to approve their timecard.
Pay Periods back	Click the scroll arrow and choose the number of pay periods prior to the current one you wish to view.

Setting	Definition
Key	When cursor moves over this box it will explain the attendance codes: • **A**: Indicates a system-generated absence. This entry will display in Red. • **M**: Indicates a missing punch. This entry will display in purple. • **P**: Indicates a prior day adjustment. This entry will display in orange. • **I**: Indicates a work period In Progress. This entry will display in green. • **D**: Indicates a default work entry was added when the employee missed a punch (as defined in the Policy associated with this employee.) This entry will display in pink. • **L**: Indicates a leave request. This entry will display in cyan. • **R**: Indicates a rejected leave request. This entry will display in maroon. • **F**: Indicates that the entry was created when Genesis Pro forecasted the employee's hours. Time forecasting will display future time transactions (based on the employee's current schedule) on screen and in reports. • A gray entry indicates a future entry.
Date	Displays the highlighted day.
Totals (Top Row)	The Totals row displays the totals for the currently selected day.
Totals (Bottom Row)	The Totals row displays the totals for the currently selected pay period.
Change Password	Click this button to change the employee's password.
Print	Click this button to print the Online Timecard, Schedules, or Benefits.
Close	Click this button to close the Employee Reviewer.

Employee Schedules Tab

The *Schedule* tab displays the employee's schedule.

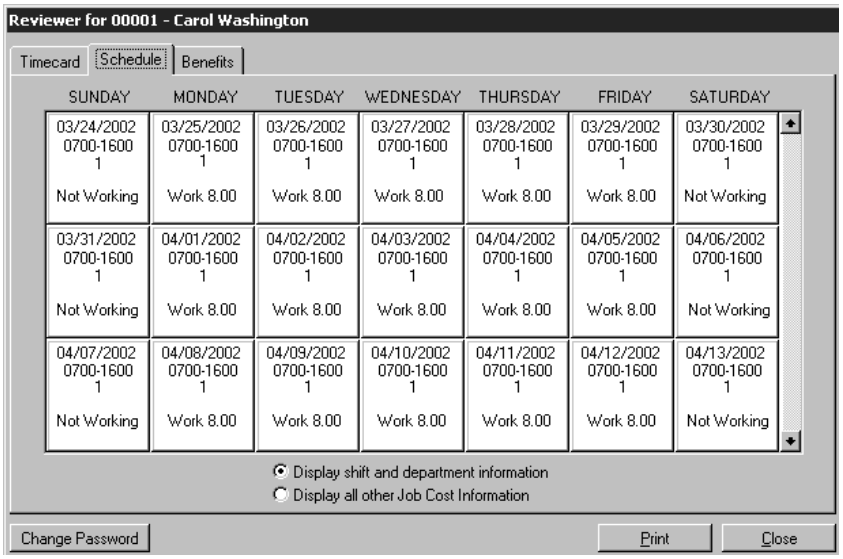


Figure 129: Employee Reviewer: Schedules tab

1. Navigate to the *Employee Reviewer* window. See ***Accessing Employee Reviewer***, page 168.
2. Click the *Schedule* tab to select. The tab contains the following information:

Setting	Definition
Calendar	The calendar will display three weeks at a time. The Schedule calendar can display either work Shift information, or Job Costing information (which Job, Step, Operation, and Task the employee is scheduled to work). **NOTE:** For more information see Display shift and department information or Display all other Job Cost information in this section.
Date	Displays the date.
Shift	Displays the Shift selected for that particular day.
Department	Displays the Department number for that particular day.
Work/Not Working	Displays if the employee is scheduled to work on that day.
Display Shift Information	Select this option to view the Shift and Department information on the schedule calendar.

Setting	Definition
Display Job Cost Information	Select this option to view the Job, Step, and Operation information on the schedule calendar.
Change Password	Click this button to change the employee's password.
Print	Click this button to print the Online Timecard, Schedules, or Benefits.
Close	Click this button to close the Employee Reviewer.

Employee Transactions Tab

The *Transaction* tab displays the individual punches for the employee

NOTE: Tasks associated with the Transactions tab, such as editing and adding punches, are covered in their own section. See ***Timecard*** and ***Transaction Maintenance***, page 251.

Description

1. Navigate to the *Employee Reviewer* window. See ***Accessing Employee Reviewer***, page 168.
2. Click the *Transactions* tab to select. The tab contains the following information:

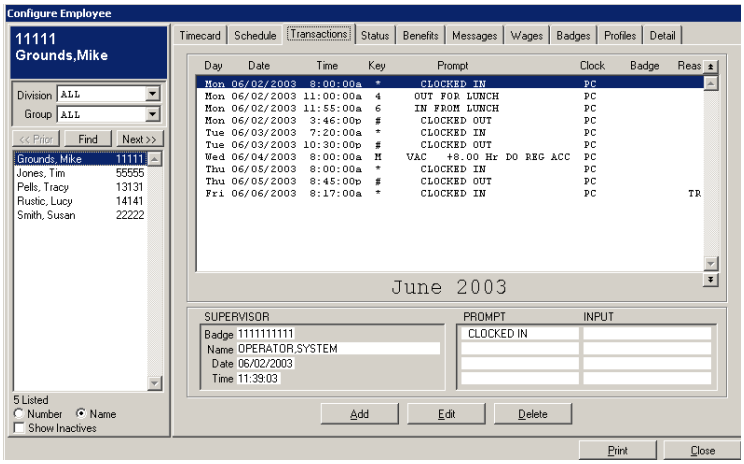


Figure 130: Configure Employee: Transaction tab

Setting	Definition
Day	Displays the day of the transaction.
Date	Displays the date of the transaction.
Time	Displays the actual time of the transaction.
Key	Displays the time clock function key pressed to generate the transaction. (i.e., * for Clock In for day, etc.)
Prompt	Displays the function prompt for the transaction.
Clock	Displays the number of the clock at which the transaction was recorded. **NOTE**: No clock number will display if the transaction was entered by a supervisor through the Genesis Pro software.
Badge	Displays the employee's badge number used for this transaction.

Setting	Definition
Reason	Displays the reason code associated with the corresponding transaction.
Supervisor	This field shows audit trail information, and displays the name and number of the supervisor who edited this transaction, if any.
Prompt	Displays the function prompt for the transaction.
Input	Displays any additional data entered with the transaction, such as a Department number, the number of pieces produced, etc.
Add/Edit/Delete	For more information on adding, editing and deleting transactions, see ***Adding and Editing Transactions***, page 253, and ***Deleting Transactions***, page 263.

Employee Benefits Tab

The *Benefits* tab reflects the employee's current benefit balances.

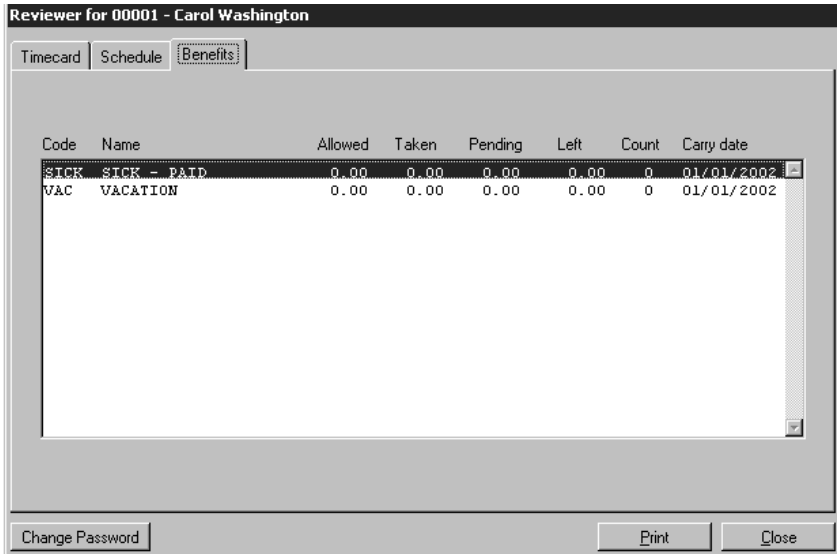


Figure 131: Employee Reviewer: Benefits tab

1. Navigate to the *Employee Reviewer* window. See ***Accessing Employee Reviewer***, page 168.
2. Click the *Benefits* tab to display the following information:

Setting	Definition
Code	Displays the category code of the benefit (i.e., VAC, SICK, etc.).
Name	Displays the category name of the benefit (i.e., Vacation, Sick, etc.)
Allowed	Displays the number of hours the employee has either been granted or earned. This number is based on the ***Benefit Accrual*** settings (if applicable).
Taken	Displays the number of hours of the benefit the employee has already taken. This number is calculated from the ***Miscellaneous*** entries on the employee's time card.
Pending	Displays the number of hours of the benefit the employee will take in the future (within the current pay period).
Left	Displays the number of hours left. This is calculated by subtracting the ***Taken*** and ***Pending*** amounts from the ***Allowed***, as follows: **Left = Allowed – (Taken + Pending)**

Setting	Definition
Count	Displays the number of individual days on which the benefit time was taken or is pending.
Carry Date	Displays the date on which the benefits will roll over, also known as the ***Reference Date*** or ***Reset Date***.
Change Password	Click this button to change the employee's password.
Print	Click this button to print the Online Timecard, Schedules, or Benefits.
Close	Click this button to close the Employee Reviewer.

Employee Timesheets

The feature of the *Employee Timesheets* allows salaried employees only to edit and submit their own timesheets.

Accessing Employee Timesheets

1. Access the GenPro directory and right click on the **Timeshet.exe** icon.
2. Select create shortcut.
3. Drag shortcut onto your desktop.
4. Double click on the **Timeshet** icon.

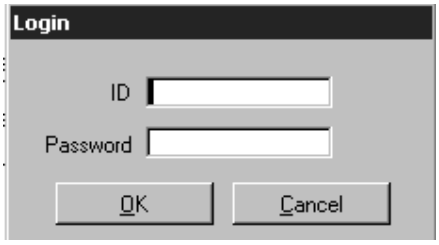


Figure 132: Timesheets Login Screen

5. Enter the ID (employee number) and Password.
   NOTE: The first time that you access the Employee Reviewer you will not have a password to enter.
6. Click **OK.**

Using Employee Timesheets

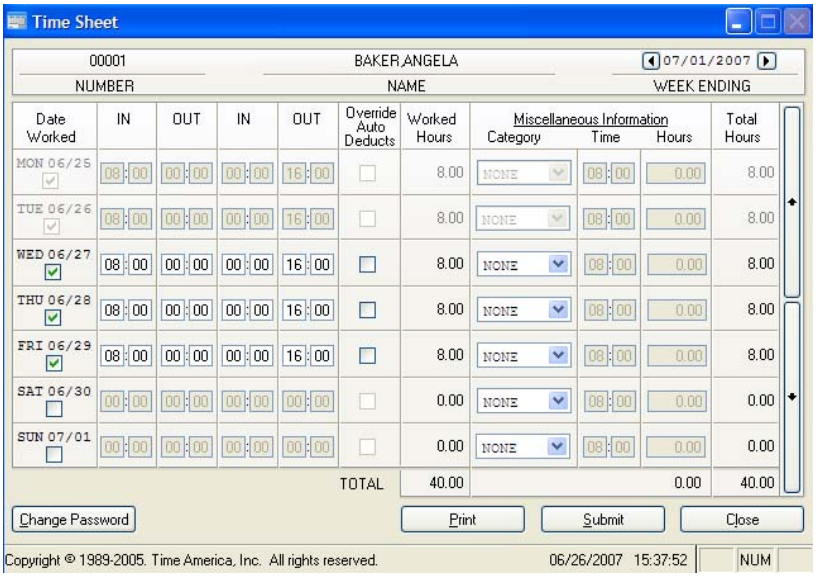


Figure 133: Employee Timesheets

1. Navigate to the *Timesheets* window. See ***Accessing Employee Timesheets,*** page 178.
2. The *Timesheets* window contains the following information:

Setting	Definition
Number	This is the employee's number.
Name	This is the employee's name.
Week Ending	Displays the last date of the week for this timecard.
Date Worked	Displays the Day, Date, and a check mark for the days that the employee is scheduled to work.
In	Displays the time the employee is recording for their start time.
Out	Displays the time the employee is recording for going Out for lunch.
In	Displays the time the employee is recording for coming back In from lunch.
Out	Displays the time the employee is recording for leaving for the day.
Override Auto Deduct	Check this option to ignore auto lunch and break deductions.
Worked Hours	Displays the total number of hours that the employee has recorded for the day, based on the "In and Out" entries.
Miscellaneous Information	Enter all transaction that are not regular worked transactions.

Setting	Definition
Category	Select the Category for this miscellaneous transaction (i.e. vacation, sick, holiday etc.).
Time	Enter the start time for this transaction.
Hours	Enter the number of hours that applies to this transaction.
Total Hours	Displays the total number of hours for regular worked hours and miscellaneous hours.
Total	Displays the total number of worked hours, miscellaneous hours, total hours.
Change Password	Click this button to change the employee's password.
Print	Click this button to print the submitted Time Sheet.
Submit	Click this button to submit the timesheets. You can also submit daily by using the arrows to the right side of the screen. **NOTE:** Once the timesheet has been submitted the employee can no longer make any changes in it.
Close	Click this button to exit the timesheet window.

NOTE: Employees will only be able to edit the current week, one-week prior, and one week ahead.

PC Clock

PC Clock is an additional module and an application that allows employees to punch In and Out, punch for Lunches and Breaks, and Transfer Departments from their PC. PC Clock offers employees access to several useful tools in an easy to use environment. Each task employees can perform with PC Clock is one or two mouse clicks away. For more information on configuring PC Clock keys see ***Configure PC Clock,*** page 336.

NOTE: It is recommended that a facilitator go over the information available in this chapter with employees.

Who Can Clock In and Out with PC Clock?

PC Clock can only be used by the employees who have been assigned to PC Clock. Employees can be assigned when they are entered into Genesis Pro or assigned at a later date. For more information see ***Configure Employee,*** page 248.

Accessing PC Clock

- Click the **Start** menu, **Programs**, **Genesis Pro,** and **PC Clock**

Default Settings to Use PC Clock

Figure 134: PC Clock

1. The *PC Clock* window contains the following information:

Setting	Definition
PC Clock Screen	Displays the date and time, and what information PC Clock is prompting you for.
Function Keys	Displays the number keys and the prompts that they will ask for.
"1" Key	This key is undefined.
"2" Key	This key is undefined.

Setting	Definition
"3" Key	This key is undefined.
"4" Key	Click this key to punch Out for Lunch.
"5" Key	This key is undefined.
"6" Key	Click this key to punch In from Lunch.
"7" Key	This key is undefined.
"8" Key	**Prompt 1:** Approve Overtime **Prompt 2:** Enter OT As HH:MM **NOTE:** This is a Supervisor only key.
"9" Key	**Prompt 1:** Enter Category **Prompt 2:** Add Hours: HH:MM **NOTE:** This is a Supervisor only key.
In Key	Click this key to punch In.
"0" Key	Click this key to enter the Department trasfer.
Out Key	Click this key to punch Out.
Clear Key	Click this key to Clear the transaction.
Back Key	Click this key to backspace one character.
Enter Key	Confirms an entry.
Close Button	Click this button Close PC Clock.

Default Keys

Default Clock In

1. Navigate to *PC Clock.*
2. Enter Badge number.
3. Click the **Enter** key.
4. Click the **In** key.
5. Click **OK** to confirm transaction.

Default Clock Out

1. Navigate to *PC Clock.*
2. Enter Badge number.

3. Click the **Enter** key.
4. Click the **Out** key.
5. Click **OK** to confirm transaction.

Default Clock Out for Lunch

1. Navigate to *PC Clock.*
2. Enter Badge number.
3. Click the **Enter** key.
4. Click the **"4"** key.
5. Click the **Enter** key.
6. Click **OK** to confirm transaction.

Default Clock In from Lunch

1. Navigate to *PC Clock.*
2. Enter Badge number.
3. Click the **Enter** key.
4. Click the **"6"** key.
5. Click **OK** to confirm transaction.

Default Transfer Department

1. Navigate to *PC Clock.*
2. Enter Badge number.
3. Click the **Enter** key.
4. Click the **"0"** key.
5. Enter the Department number
6. Click the **Enter** key.
7. Click **OK** to confirm transaction.

Other Key Functions

PC Clock keys can be defined for any functionality. For more information see ***Configure PC Clock,*** page 336.

WebClock

WebClock is an additional module and an application that allows employees to punch In and Out, punch for Lunches and Breaks, and Transfer Departments from a web browser. For more information on configuring WebClock keys see ***Configure WebClock,*** page 342.

NOTE: It is recommended that a facilitator go over the information available in this chapter with employees.

Who Can Clock In and Out with WebClock?

WebClock can only be used by the employees who have been assigned to use the WebClock. Employees can be assigned when they are entered into Genesis Pro or assigned at a later date. For more information see ***Employee Details Tab,*** page 243.

Accessing WebClock

- Launch your preferred web browser and point it to the proper web page (e.g. your companies intranet site that contains the WebClock). The WebClock home page will appear:

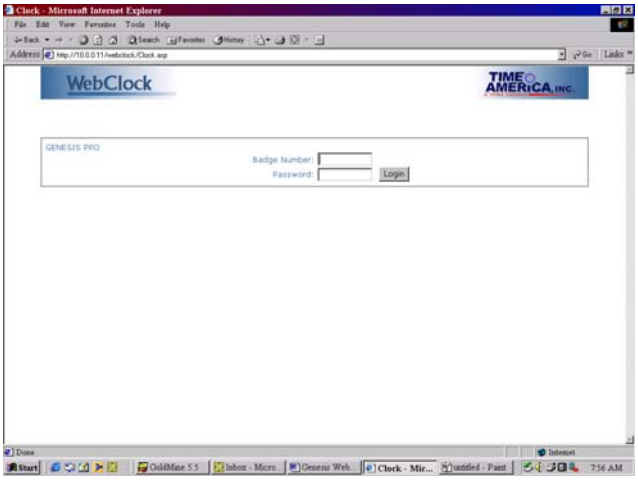


Figure 135: WebClock Home Page

Clock Functions

Clocking In

1. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

2. Click **Login**. The Clock Function page will appear:

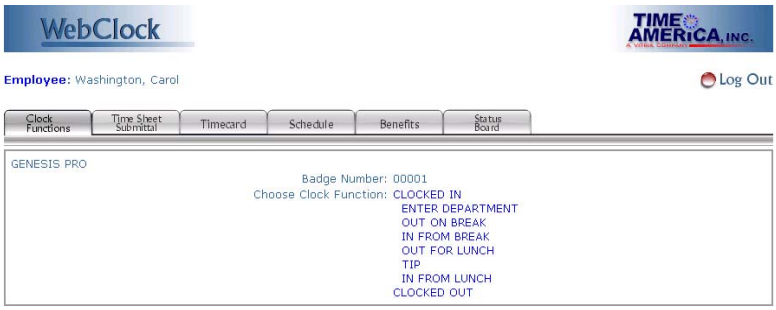


Figure 136: WebClock Function Page

3. Select **Clock In**. The Clock In page will appear:

Figure 137: WebClock Clock In Page

4. Click **Submit**. The Transaction Successfully Entered label will appear:

Figure 138: Transaction Successfully Entered Label

5. Click **Log Out** to return to the WebClock Home Page.

Clocking Out

1. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

2. Click **Login**. The Clock Function page will appear:

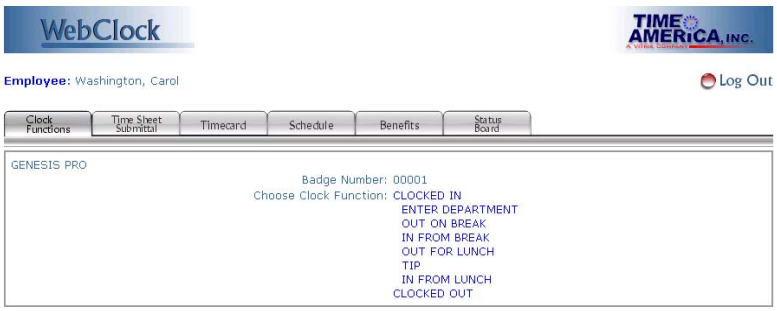


Figure 139: WebClock Function Page

3. Select **Clock Out**. The Clock Out page will appear:

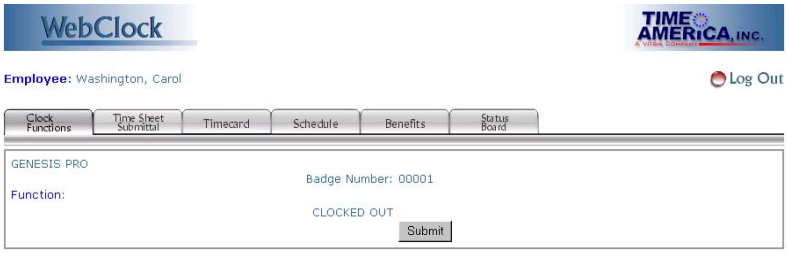


Figure 140: WebClock Clock Out Page

4. Click **Submit**. The Transaction Successfully Entered label will appear:

Figure 141: Transaction Successfully Entered Label

5. Click **Log Out** to return to the WebClock Home Page.

Starting Lunch or Break

1. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

2. Click **Login**. The Clock Function page will appear:

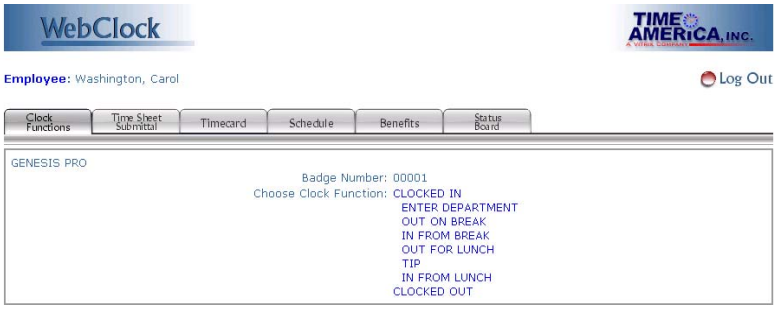


Figure 142: WebClock Function Page

3. Select **Out For Lunch** or **Out On Break** whichever is appropriate. The Out For Lunch or Out On Break page will appear:

Figure 143: WebClock Out for Lunch Page

4. Click **Submit**. The Transaction Successfully Entered label will appear:

Figure 144: Transaction Successfully Entered Label

5. Click **Log Out** to return to the WebClock Home Page.

Ending Lunch or Break

1. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

2. Click **Login**. The Clock Function page will appear:

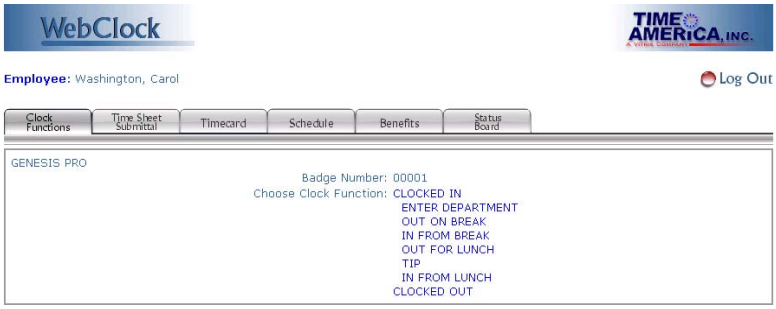


Figure 145: WebClock Function Page

3. Select **In From Lunch** or **In From Break** whichever is appropriate. The In From Lunch or In From Break page will appear:

Figure 146: WebClock In from Lunch Page

4. Click **Submit**. The Transaction Successfully Entered label will appear:

Figure 147: Transaction Successfully Entered Label

5. Click **Log Out** to return to the WebClock Home Page.

Transferring to a new Department, Job, Step, Operation or Task

1. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

2. Click **Login**. The Clock Function page will appear:

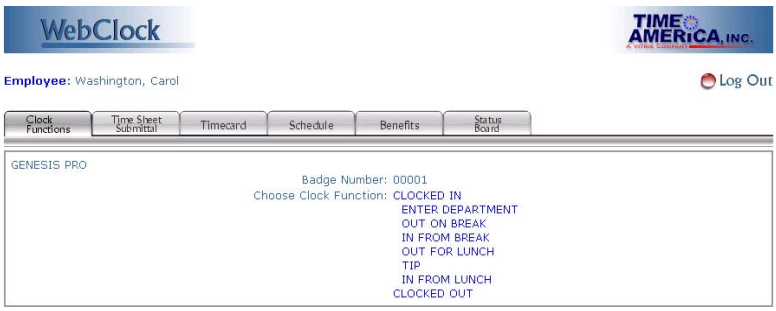


Figure 148: WebClock Function Page

3. Select **Enter Department, Enter Job, Enter Step, Enter Operation** or **Enter Task** whichever is appropriate.

   The specific link you selected will appear:

Figure 149: WebClock Dpartment Page

4. Enter the **Department** code. If you need **Help** determining how many characters are in the Department code click the **Question Mark**.

5. Click Enter.

6. Click **Submit**. The Transaction Successfully Entered label will appear:

Figure 150: Transaction Successfully Entered Label

7. Click **Log Out** to return to the WebClock Home Page.

Enter Tips

1. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

2. Click **Login**. The Clock Function page will appear:

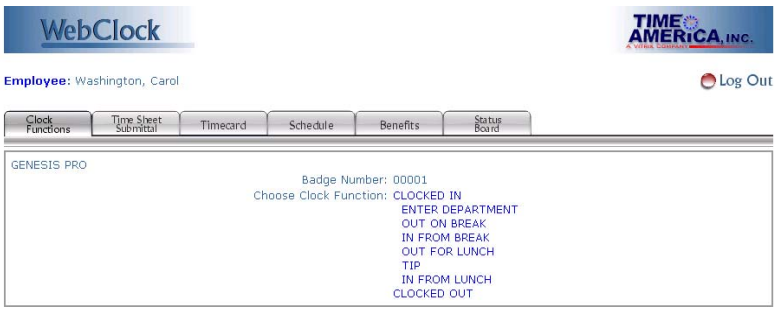


Figure 151: WebClock Function Page

3. Select **Tip**. The Tip page will appear:

Figure 152: WebClock Department Page

4. Enter **Tip Amount**.
   Remember to use the decimal—e.g. $10.00 = 10.00

   If you need **Help** determining how many characters are available click the **Question Mark**

5. Click Enter.

6. Click **Submit**. The Transaction Successfully Entered label will appear:

Figure 153: Transaction Successfully Entered Label

7. Click **Log Out** to return to the WebClock Home Page.

Other Key Functions

WebClock keys can be defined for any functionality. For more information see ***Configure WebClock,*** page 342.

The Extras

Viewing the Time Card

1. Launch your preferred web browser and point it to the proper web page (e.g. your companies intranet site that contains the WebClock). The WebClock home page will appear:

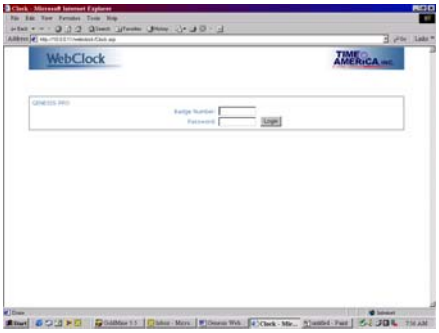


Figure 154: WebClock Home Page

2. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

3. Click **Login**. The Clock Function page will appear:

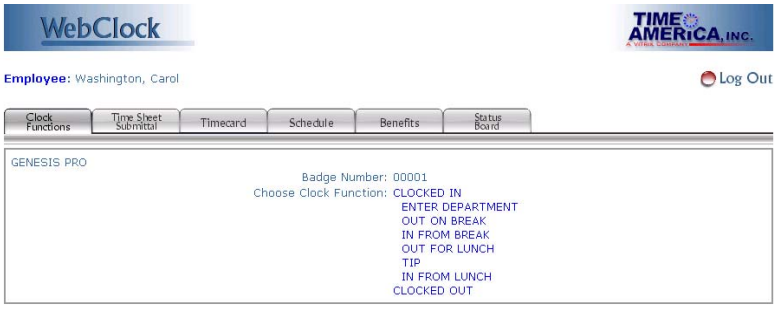


Figure 155: WebClock Function Page

4. Select the **Timecards** tab. The Timecard page will appear:

Figure 156: WebClock Timecard Page

NOTE: The Timecard is a snapshot of Genesis based on the most current process of data. The Timecard display is view only and will not accept any edits.

5. Click **Previous** and **Next** to display other pay periods.

   Codes and Colors:
   - A = Absent (red)
   - D = Default Hours (pink)
   - I = In Now (green)
   - M = Missing Punch (purple)

6. Click **Log Out** to return to the WebClock Home Page.

Viewing the Schedule

1. Launch your preferred web browser and point it to the proper web page (e.g. your companies intranet site that contains the WebClock). The WebClock home page will appear:

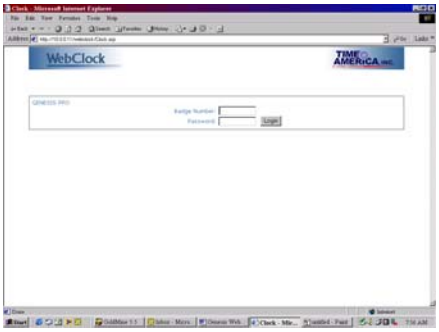


Figure 157: WebClock Home Page

2. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

3. Click **Login**. The Clock Function page will appear:

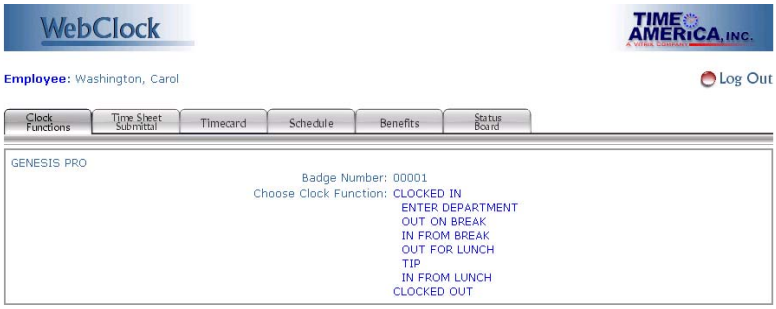


Figure 158: WebClock Function Page

4. Select the **Schedules** tab. The Schedule page will appear:

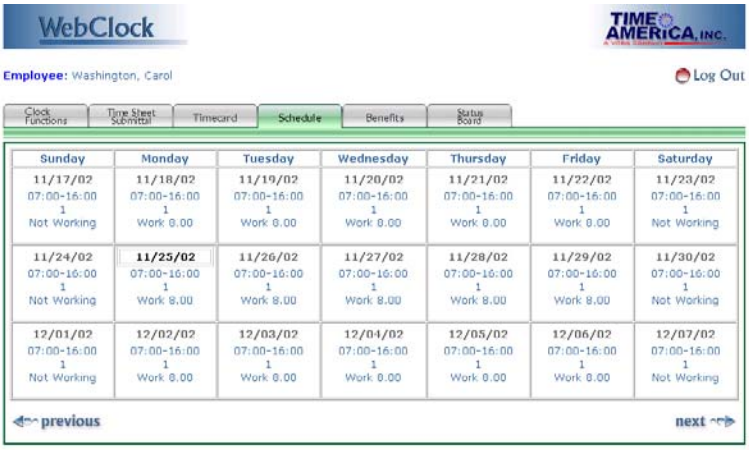


Figure 159: WebClock Schedule Page

NOTE: The Schedule is a snapshot of Genesis based on the most current process of data. The Schedule display is view only and will not accept any edits.

5. Click **Previous** and **Next** to view other weeks.

6. Click **Log Out** to return to the WebClock Home Page.

Viewing the Benefits

1. Launch your preferred web browser and point it to the proper web page (e.g. your companies intranet site that contains the WebClock). The WebClock home page will appear:

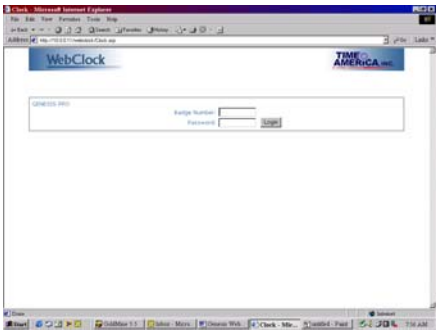


Figure 160: WebClock Home Page

2. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

3. Click **Login**. The Clock Function page will appear:

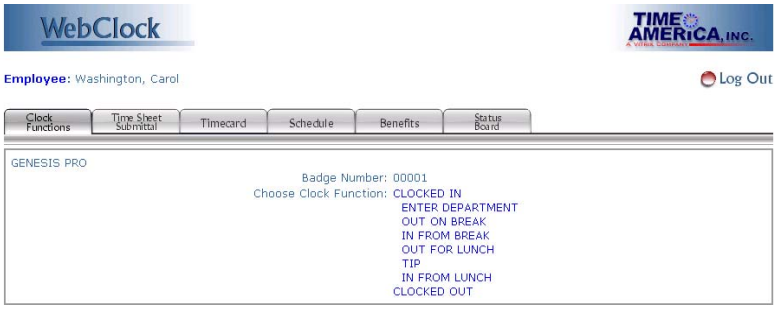


Figure 161: WebClock Function Page

4. Select the **Benefits** tab. The Benefits page will appear:

Figure 162: WebClock Benefits Page

NOTE: The Benefits are a snapshot of Genesis based on the most current process of data. The Benefits display is view only and will not accept any edits.

5. Click **Log Out** to return to the WebClock Home Page.

Viewing the Status Board

1. Launch your preferred web browser and point it to the proper web page (e.g. your companies intranet site that contains the WebClock). The WebClock home page will appear:

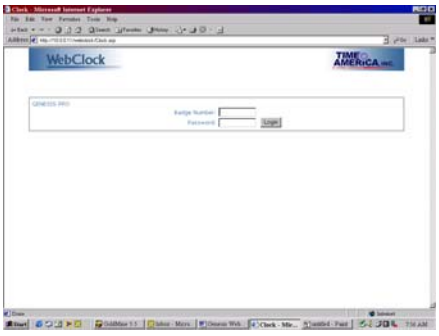


Figure 163: WebClock Home Page

2. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

3. Click **Login**. The Clock Function page will appear:

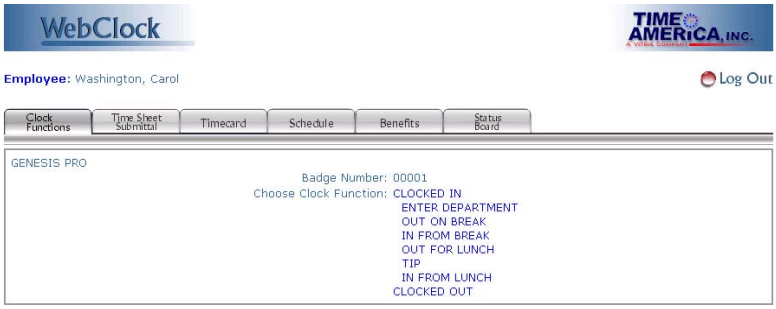


Figure 164: WebClock Function Page

4. Select the **Status Board** tab. The Status Board page will appear:

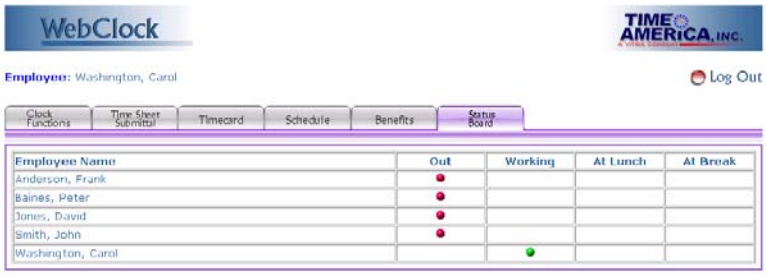


Figure 165: WebClock Status Board Page

NOTE: The Status Board is a snapshot of Genesis based on the most current process of data. The Status Board display is view only and will not accept any edits.

5. Click **Log Out** to return to the WebClock Home Page.

Submitting Time Sheets

WebClock allows employees to enter their time via time sheet submittal. Time sheet submittal may be used instead of clocking in and out, or it may be used in conjunction with clocking in and out.

The entries from a submitted time sheet are visible in the Online Timecard in Genesis Pro. Once a time sheet has been submitted it cannot be changed. Only additional time may be added.

NOTE: An additional clock must be configured to use TimeSheet Submittal, for details see page 346

1. Launch your preferred web browser and point it to the proper web page (e.g. your companies intranet site that contains the WebClock). The WebClock home page will appear:

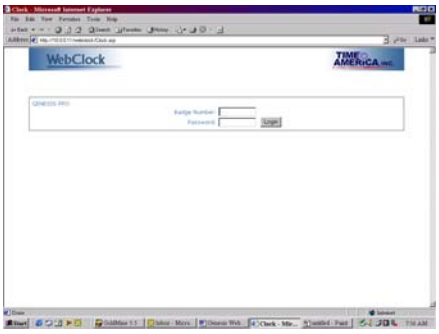


Figure 166: WebClock Home Page

2. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

3. Click **Login**. The Clock Function page will appear:

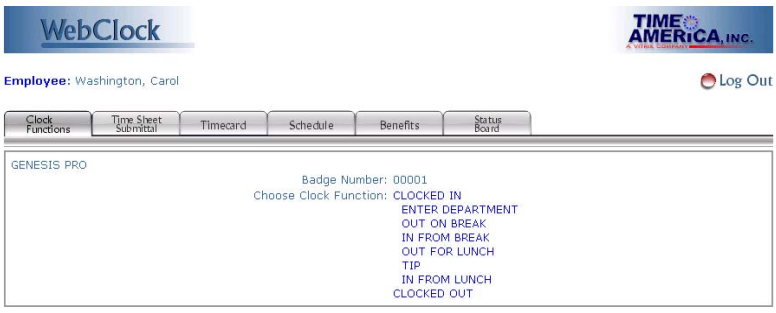


Figure 167: WebClock Function Page

4. Select the **TimeSheet Submittal** tab. The TimeSheet Submittal page will appear:

Figure 168: WebClock TimeSheet Submittal Page

5. Verify that the dates for the time sheet are correct. Click **Previous** or **Next** to scroll to the date desired.

6. Fill in the appropriate fields:

   Shifts Per Day—This setting determines how many shifts may be entered each day for this employee. A shift is an unbroken period of time worked during the day. Enter the number of shifts per day for which Genesis Pro should expect entries.

7. Click the **Update** button to complete the entry before completing any other settings on this page. The page will reload.

8. Fill in the Time Sheet data information for each shift, for each day as follows:

Setting	Definition
Type	Select the pay type that applies for this shift. (Work)
Start Day	Type in the specific start time of the shift for the day.
Start Lunch	Type in the specific start time for lunch.
End Lunch	Type in the specific end time for lunch.
End Day	Type in the specific end time of the shift for the day.
Enter Department	Select the department to which this shift will be coded.
Enter Job	Select the job to which this shift will be coded.
Enter Step	Select the step to which this shift will be coded.

*Note: You do have the ability to complete a single day and **Submit Shifts For Processing** only for that day or you can wait and complete the entire week then **Submit Shift For Processing.***

9. When all shifts have been entered, click the **Save New Shifts** button. The WebClock Time Sheet Submittal Page will appear with the entered data:

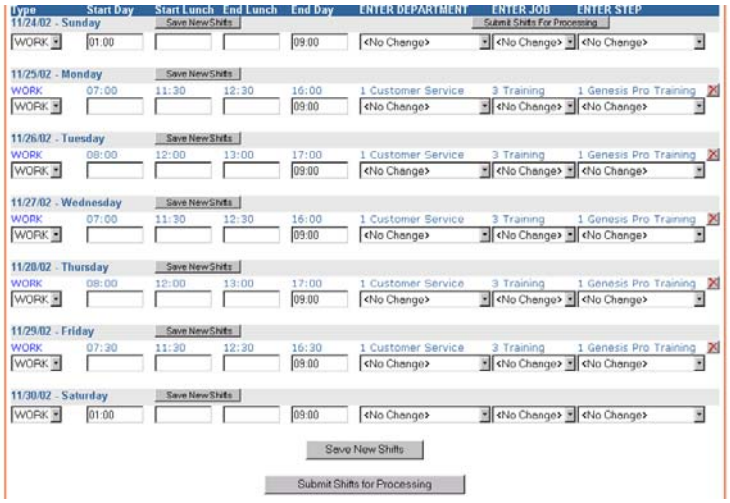
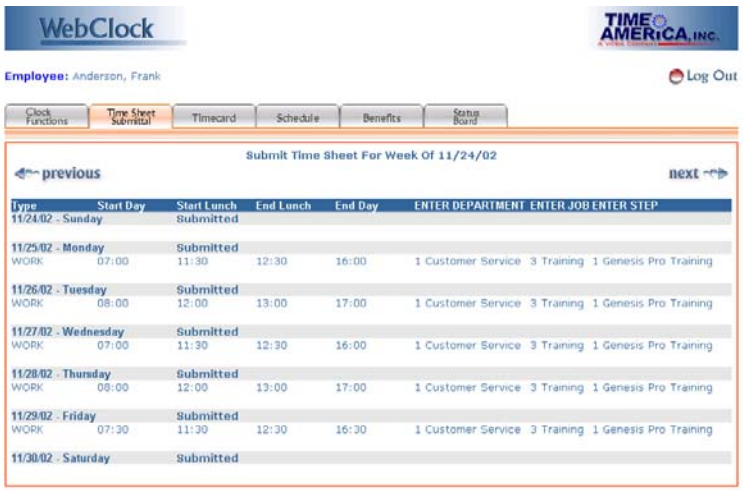


Figure 169: Time Sheet Submittal page with data

10. When all shifts have been entered and confirmed, click the **Submit Shifts For Processing** button. The **Submit Time Sheet For Week** Screen will appear:



11. Click **Log Out** to return to the WebClock Home Page.

Changing a Password

1. Launch your preferred web browser and point it to the proper web page (e.g. your companies intranet site that contains the WebClock). The WebClock home page will appear:

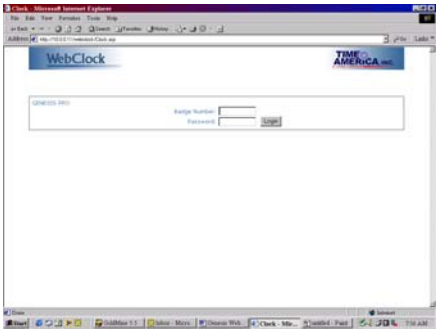


Figure 170: WebClock Home Page

2. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

3. Click **Login**. The Clock Function page will appear:

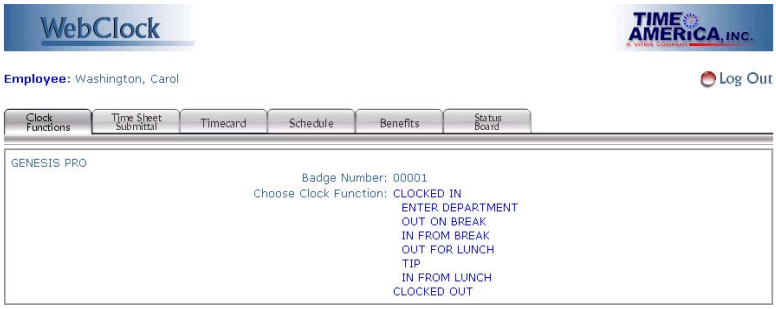


Figure 171: WebClock Function Page

4. Click the **Employee** link top left corner of screen in blue. The Change Password page will appear:

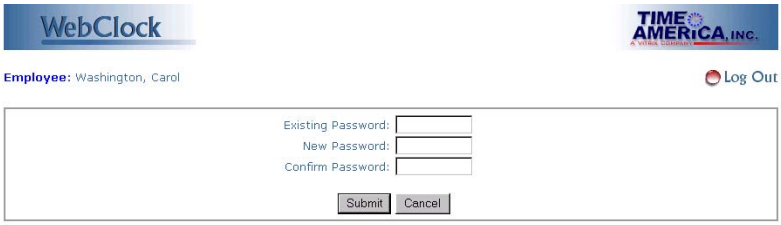


Figure 172: WebClock Change Password Page

5. Enter the old password in the **Existing Password** field and press Tab.

6. Enter the new password in the **New Password** field and press Tab.

7. Reenter the new password in the **Confirm Password** field. Click **Submit**.

8. The system will automatically return to the Clock Function Screen when complete.

Supervisor Functions

Supervisors can perform all clock functions, as the employees do, except for TimeSheet Submittal. In addition they can approve overtime and add categories from the WebClock.

Approving Overtime

1. Launch your preferred web browser and point it to the proper web page (e.g. your companies intranet site that contains the WebClock). The WebClock home page will appear:

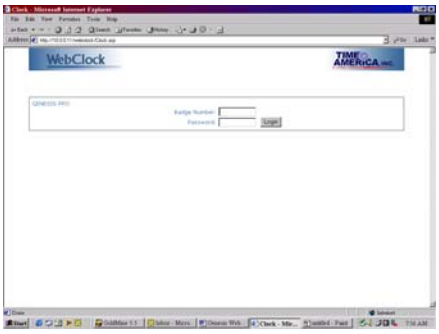


Figure 173: WebClock Home Page

2. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

3. Click **Login**. The Select Employee To Maintain page will appear:

Figure 174: WebClock Select Employee to Maintain Page

4. Select employee to work with by **Employee Number** or **Name**. The Supervisor Clock Function with selected employee name page will appear:

Figure 175: WebClock Supervisor Clock Function Page

5. Select **Approve Overtime**. The Approve Overtime page will appear.

Figure 176: Approve Overtime Page

6. Enter **Overtime** hours in HHMM format e.g. 3 Overtime Hours = 0300.

   If you need **Help** determining what can be entered into this field click the **Question Mark**

7. Click **Enter**.

8. Confirm the date and time (which you can edit) then Click **Submit**.

9. The Transaction Successfully Entered label will appear.

10. Click **Log Out** to return to the WebClock Home Page.

Adding a Category Transaction

1. Launch your preferred web browser and point it to the proper web page (e.g. your companies intranet site that contains the WebClock). The WebClock home page will appear:

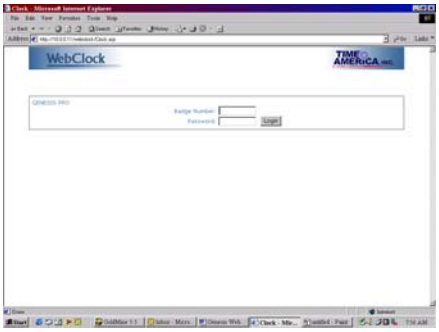


Figure 177: WebClock Home Page

2. Enter Badge Number and Password.

   NOTE: The Badge Number may include alphanumeric characters, if so all alpha characters must be in uppercase.

3. Click **Login**. The Select Employee To Maintain page will appear:

Figure 178: WebClock Select Employee to Maintain Page

4. Select employee to work with by **Employee Number** or **Name**. The Supervisor Clock Function with selected employee name page will appear:

Figure 179: WebClock Supervisor Clock Function Page

5. Select **Enter Category**. The Enter Category page will appear:

Figure 180: WebClock Category Page

6. Enter the **Category Code**.

   If you need **Help** determining what characters will be accepted click the **Question Mark.**

7. Click **Enter**.

8. Enter **Category Hours** in HHMM format e.g. 8 Hours = 0800.

   If you need **Help** determining what can be entered into this field click the **Question Mark.**

9. Click **Enter**.

10. Enter the date and time for the Category Transaction then Click **Submit**.

    The Transaction Successfully Entered label will appear.

.

11. Click **Log Out** to return to the WebClock Home Page

Chapter VII Employee Maintenance

This section covers the concepts and tasks for managing employee information. It includes information on adding employees, editing employee information, and managing employee schedules and assignments. It also contains links to the Timecard editing sections of this manual.

Configure Employee

The *Configure Employee* window contains all information relating to your employees, including contact, schedule, and time sheet data. All of the tabs in the window are described in this chapter, however, some of the tabs (such as the *Timecard* and *Transactions*) have additional tasks associated with them and have been given their own sections in this manual.

There are two ways to access the *Configure Employee* window: by menu or by tool button. Both methods are described below.

1. Click the **Edit** menu**, Employee** or click the **Maintenance** button on the toolbar. The *Configure Employee* window will open.

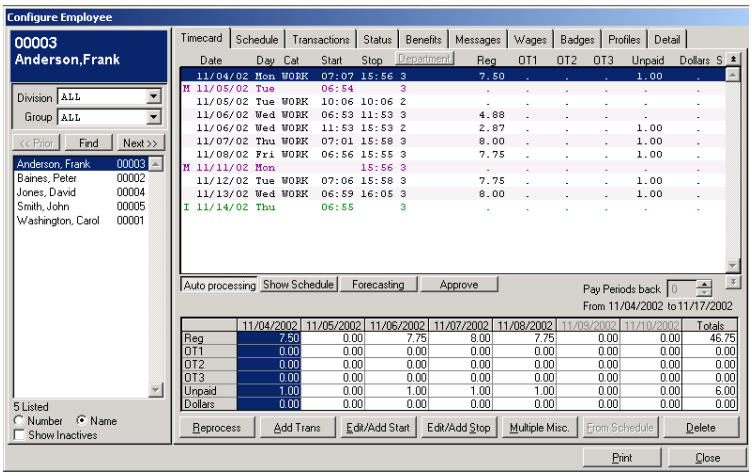


Figure 181: Configure Employee

Employee List

The *Employee List* window contains a list of the employees in the database. Sorting options are also available as described below:

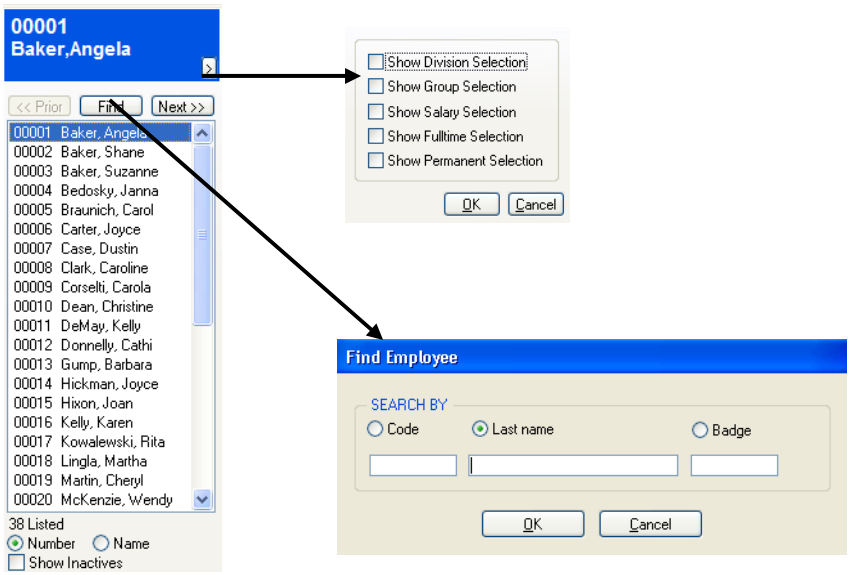


Figure 182: Employee List

Setting	Definition
Selected Employee	Displays the employee name and number of the selected employee.
Filters	Show Division Selection: Select a Division to only view employees assigned to that Division. Show Group Selection: Select a Group to only view employees assigned to that Group. Show Salary Selection: Select ALL, YES or NO to view employees assigned to that option. Show Fulltime Selection: Select ALL, YES or NO to view employees assigned to that option. Show Permanent Selection: Select ALL, YES or NO to view employees assigned to that option.
Previous button	Press this button to go to an individual who is previous on the list.
Find button	Press this button to search for a name by code, last name or badge number Enter in the appropriate name, code or badge number when the dialog box appears.
Next button	Press this button to go to an individual who is next on the list.
Number	Select this option to have the employees sort by employee number.

Setting	Definition
Name	Select this option to have the employees sort by employee name.
Show Inactives	Select this option to have inactive employees viewable in the Employee List

Employee Timecard (Description) Tab

The *Timecard* tab displays the employee's timesheet information.

NOTE: Tasks associated with the Timecard, such as editing and adding punches, are covered in their own chapter. See *Timecard and Transaction Maintenance*, page 251.

1. Navigate to the *Configure Employee* window.
2. When you first enter the *Configure Employee* window, the *Timecard* tab is selected automatically and contains the following information:

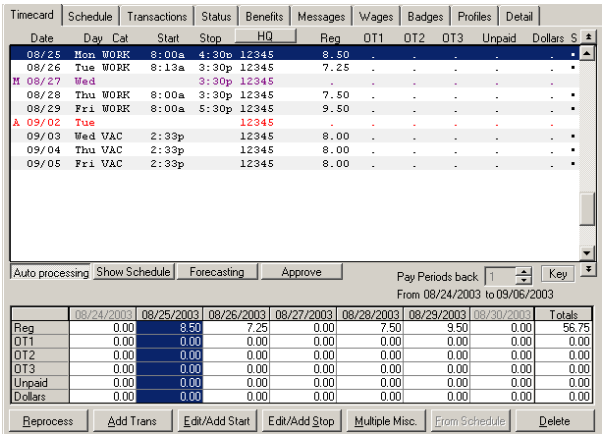


Figure 183: Configure Employee: Timecard tab

Setting	Definition
Attendance Code	This field is **not** labeled. It displays a code to indicate an exception regarding the entry. See Key.
Date	Displays the date of the entry.
Day	Displays a three-character code for the day of the week of the entry.
Cat	Displays the category associated with the entry (i.e., Work, Lunch, Break, Vacation, Sick, Absent, etc.)
Start	Displays the start time of the entry (i.e., the time at which the employee clocked in for the day, started lunch, etc.).
Stop	Displays the stop time of the entry (i.e., the time at which the employee clocked out for the day, ended lunch, etc.).
Department	By default, this field displays the Department the employee worked in. By clicking the **Department** button in the field header, you can choose to display the Job, Step, Operation, or Task (if applicable). Each time you click the button; it advances to the next item in order (Department, Job, Step, Operation, Task), eventually returning to Department.

Setting	Definition
Reg.	Displays the number of hours at straight time the employee will be paid for this entry. This number is calculated using the ***Start*** and ***Stop*** times, adjusted according to the Rounding, Lunch and Break policies defined in the Shift Group assigned to this employee.
OT1	Displays the number of hours at OT1 the employee will be paid for this entry, if any. This number is calculated using the ***Start*** and ***Stop*** times, adjusted according to the Rounding, Lunch and Break rules defined in the Shift Group assigned to this employee, as well as the Overtime rules defined in the Policy assigned to this employee.
OT2	Displays the number of hours at OT2 the employee will be paid for this entry, if any. This number is calculated using the ***Start*** and ***Stop*** times, adjusted according to the Rounding, Lunch and Break rules defined in the Shift Group assigned to this employee, as well as the Overtime rules defined in the Policy assigned to this employee
OT3	Displays the number of hours at OT3 the employee will be paid for this entry, if any. This number is calculated using the ***Start*** and ***Stop*** times, adjusted according to the Rounding, Lunch and Break rules defined in the Shift Group assigned to this employee, as well as the Overtime rules defined in the Policy assigned to this employee
Unpaid	Displays the number of unpaid hours for this entry, if any. Unpaid lunches and breaks will be reflected in this column, if appropriate.
Dollars	Displays the amount earned for this entry.
S	Displays a dot if a Supervisor has gone in to edit the punch.
Auto Processing button	Depress this button to *automatically* process time transactions whenever they are added or edited. Processing posts new and changed transactions to the database and allows them to be displayed on all reports. If this box is clear, you must click the **Reprocess** button each time you want to update employee transactions.
Show Schedule button	Depress this button to display the employee's scheduled start and stop times on screen. This can be used to help with editing when there is an absence or missing punch.

Setting	Definition
Forecasting button	Depress this button to generate projected time transactions. Time forecasting will display future time transactions (based on the employee's current schedule) on screen and in reports.
Approve / Unapprove button	Depress this button to approve or unapprove the selected pay period for the selected employee.
Pay Periods back	Click the scroll arrow and choose the number of pay periods prior to the current one you wish to view. **NOTE**: Although you may view prior pay periods, only editable pay periods may be changed. This is determined by the ***Number of Editable Pay Periods*** in *Configure Main Company* dialog box, and the ***Block Prior Pay Periods*** setting for the current user.
Pay Period	Displays the starting date and the ending date of the currently selected pay period.
Key	When cursor moves over this box it will explain the attendance codes: • **A**: Indicates a system-generated absence. This entry will display in Red. • **M**: Indicates a missing punch. This entry will display in purple. • **P**: Indicates a prior day adjustment. This entry will display in orange. • **I**: Indicates a work period In Progress. This entry will display in green. • **D**: Indicates a default work entry was added when the employee missed a punch (as defined in the Policy associated with this employee.) This entry will display in pink. • **L**: Indicates a leave request. This entry will display in cyan. • **R**: Indicates a rejected leave request. This entry will display in maroon. • **F**: Indicates that the entry was created when Genesis Pro forecasted the employee's hours. Time forecasting will display future time transactions (based on the employee's current schedule) on screen and in reports. • A gray entry indicates a future entry.
Date Column	Displays totals for each day in the pay period.

Setting	Definition
Totals	The Totals column displays the totals for the currently selected pay period.
Reprocess	Click this button to update employee transactions. Processing posts new and changed transactions to the database and allows them to be displayed on all reports. **NOTE**: If ***Auto Processing*** is checked, you will not need to use this button each time a transaction is changed.
Add Trans	Click this button to add a transaction (punch) for the employee. For more information on this feature, see ***Adding and Editing Transactions***, page 253.
Edit/Add Start	Click this button to add or edit a Starting transaction (such as a Clock In for day or Start Lunch) for the employee. For more information on this feature, see ***Edit/Add Start***, page 258.
Edit/Add Stop	Click this button to add or edit an Ending transaction (such as a Clock Out for day or End Lunch) for the employee. For more information on this feature, see ***Edit/Add Stop***, page 259.
Multiple Misc.	Click this button to add multiple or duplicated Miscellaneous transactions. This can be used to enter a vacation that lasts several days, etc. For more information on this feature, see ***Multiple Miscellaneous***, page 259.
From Schedule	Click this button to auto-fill a work day based on the employee's schedule. For more information on this feature, see ***From Schedule***, page 262.
Delete	Click this button to delete a transaction. For more information on this feature, see ***Delete a Transaction***, page 263.

Employee Schedule Tab

The *Schedule* tab displays and allows you to edit the employee's schedule.

NOTE: Employees are not required to have a specific schedule, but without a schedule the following items will not work in the system:

- Rounding Rules
- Automatic Lunch and Break Deductions
- Attendance Codes
- Exceptions

Configure Employee Schedules

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Schedule* tab to select. The tab contains the following information:

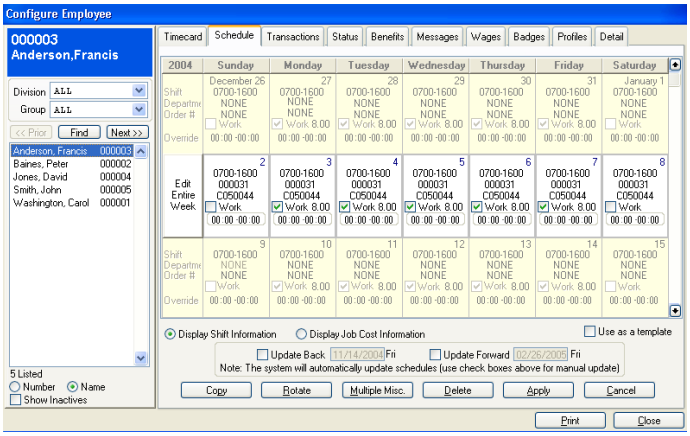


Figure 184: Configure Employee: Schedule tab

Setting	Definition
Calendar	The calendar will display three weeks at a time. The currently selected week will display in white, the previous and following week display in yellow. The current week will also have a field where you can edit the entire week. For more information on this feature, see the *Edit Entire Week* section. The Schedule calendar can display either work Shift information, or Job Costing information (which Job, Step, Operation, and Task the employee is scheduled to work). You can switch back and forth easily. For more information on this feature, see the *Schedule Details* section.
Date	Displays the date.

Setting	Definition
Shift	Displays the Shift selected for that particular day. **NOTE:** Before a shift is assigned the system will default the shift assignment to a floater shift.
Department	Displays the Department number for that particular day.
Job	Displays the Job number for that particular day.
Work	Check this box to indicates whether or not the employee is scheduled to work that day, and how many paid hours are forecasted.
Override	Enter the start and stop schedule change time for rounding rule purposes only.
Display Shift Information	Select this option to view the Shift, Department and Job information on the schedule calendar.
Display Job Cost Information	Select this option to view the Step, Operation, and Task information on the schedule calendar.
Template	Check this box to make this employee's schedule a template. This will enable you to copy this employee's schedule for other employees. For more information on this feature, see ***Create an Employee Schedule Template***, page 217.
Update Back	Check this box to update previous weeks' schedule data. Also enter the date to which you wish to update. For more information on this feature, see ***Assign or Edit an Employee Schedule***, page 213.
Update Forward	Check this box to update following weeks' schedule data. Also enter the date to which you wish to update. For more information on this feature, see ***Assign or Edit an Employee Schedule***, page 213.
Copy Button	Click this button to copy a previously defined schedule template to this employee. For more information on this feature, see ***Copy an Employee Schedule Template***, page 217.
Rotate Button	Click this button define a rotating schedule for this employee. For more information on this feature, see ***Create a Rotating Schedule***, page 215.

Setting	Definition
Multiple Misc. Button	Click this button to add multiple or duplicated Miscellaneous transactions. This can be used to enter a vacation that lasts several days, see ***Multiple Miscellaneous***, page 259.
Delete	This option opens the Delete Assignments screen. Here you can remove assignments, All Before a Date or All After a Date.

Assign or Edit an Employee Schedule

The processes for assigning a schedule for the first time and for editing the schedule assignment are the same. As part of this process, you will select a Shift, Department, Job, Step, Operation, and Task (as appropriate) for the employee.

1. Navigate to the *Schedule* tab of the *Configure Employee* window. See ***Configure Employee Schedules***, page 211.
2. Navigate to the week you wish the schedule to start by using the scroll bar on the right side of the screen.
3. Click ***Edit Entire Week*** and/or ***Shift*** area on Sunday of the selected week.

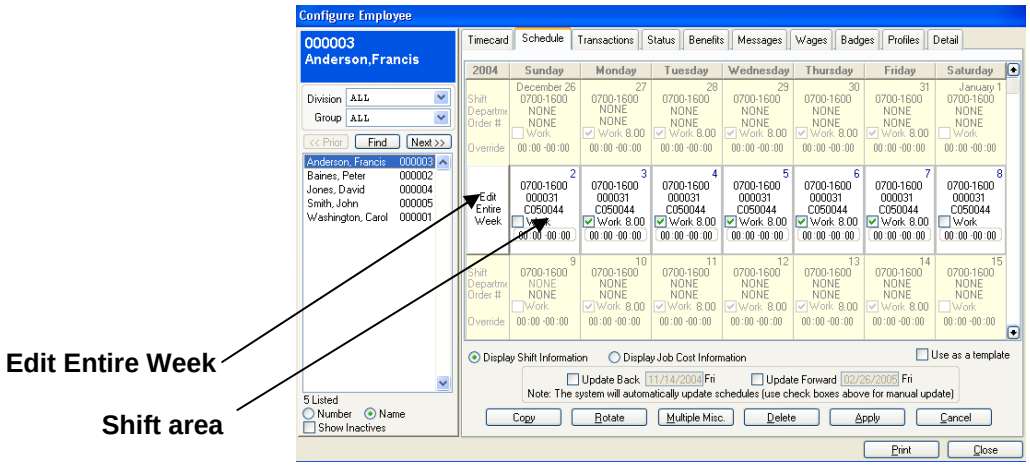


Figure 185: Adding/Editing a Schedule Shift

4. If you clicked *Edit Entire Week*, the *Schedules Detail for the Week* dialog box will open.
5. If you clicked in the Shift area, the *Schedule Details* dialog box will open.

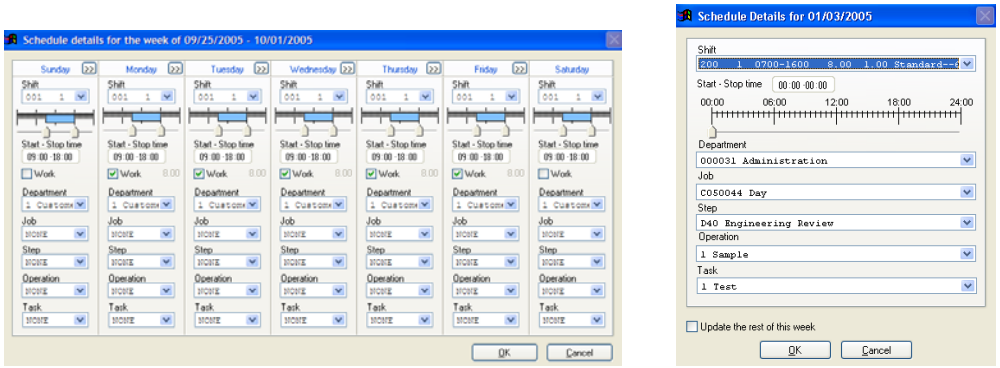


Figure 186: Schedule Details for the Week and Schedule Details

6. Highlight from the settings as appropriate:

Setting	Definition
Shift	Select a pre-defined Shift for this employee.
Start/Stop Override	Enter the start and stop schedule change time for rounding rule purposes only.
Graphic Override	Use the graphic timeline to define the start and stop schedule change time for rounding rule purposes only.
Work	Check this box to indicate whether or not the employee is scheduled to work that day, and how many paid hours are forecasted.
Department	Select a pre-defined Department for this employee. (Optional)
Job	Select a pre-defined Job for this employee. (Optional)
Step	Select a pre-defined Step for this employee. (Optional)
Operation	Select a pre-defined Operation for this employee. (Optional)
Task	Select a pre-defined Task for this employee. (Optional)
Update Rest of Week	Click/Check this box to update the rest of the current week with these settings. (Recommended)

7. Click **OK** to commit the changes and return to the *Schedule* screen. The Shift and Department information selected will display.

   NOTE: Genesis Pro automatically keeps the schedule current for three months into the future, so you needn't update manually unless you are making a change that should apply to dates that have already been updated.

8. Check the **Work** box of each day of the week the employee is scheduled to work.

9. If you are editing the schedule and wish these changes to apply into the future, click the **Update Forward** box or **Update Back** box.

10. Click **Apply** to save the changes and update Forward (if selected for editing).

Delete a Schedule

1. Navigate to the *Schedule* tab of the *Configure Employee* window. See ***Configure Employee Schedules***, page 211.
2. Click the **Delete** button. You will be prompted:

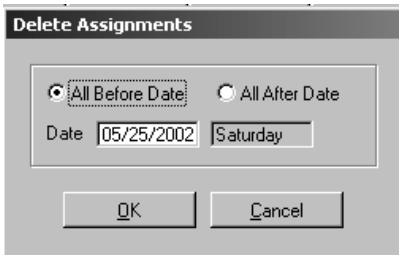


Figure 187: Deletion Confirmation

3. Fill in the settings as appropriate:

Setting	Definition
All Before Date	Select this option to delete schedules leading up to a certain date.
All After Date	Select this option to delete schedules occurring after a certain date.
Date	Enter the date to consider when deleting the schedules.

4. Click **OK**. You will be prompted again:

5. Click **OK** to confirm the deletion.

Create a Rotating Schedule

Rotating schedules allow you to accommodate employees who work schedules that have a pattern other than a weekly cycle. You can specify the number of days in the rotation and what time period the rotation begins.

Rotating Schedule Example

Jane Doe works every other Saturday. She happens to work this coming Saturday, and will be off the next Saturday.

To configure this you would modify her schedule so that Work is checked for this Saturday, but not the next Saturday. The Start Date for the Rotation would be the beginning of the current week, and the number of days in the cycle would be 14.

1. Navigate to the *Schedule* tab of the *Configure Employee* window. See ***Configure Employee Schedules***, page 211.
2. Click the **Rotate** button. The *Apply Rotating Schedule* dialog box will open.

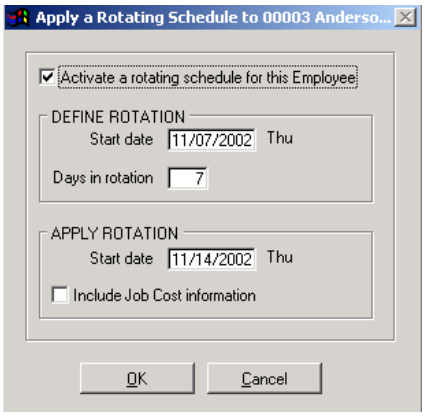


Figure 188: Apply Rotating Schedule

3. Fill in the settings as appropriate:

Setting	Definition
Activate a rotating schedule for this Employee	Check this box to enable a rotating schedule for the selected employee. **TIP**: You can "remove" a rotating schedule that has already been set simply by un-checking this box.
Define Rotation	These settings define the pattern for rotation
Start Date	Enter the date Genesis Pro should start with to determine the rotation pattern.
Days in Rotation	Enter the number of days in the rotation pattern.
Apply Rotation	These settings determine when the rotating schedule will take effect.
Start Date	Enter the date on which the rotating schedule should take effect.
Include Job Cost Information	Check this box if Genesis Pro should automatically copy the Job, Step, Operation, and Task assignments along with the working times.

4. Click **OK** to commit the changes and return to the *Schedule* screen.

Create an Employee Schedule Template

An employee's schedule can be saved as template so that it can be copied to other employees. This is a convenient way of duplicating an unusual work pattern or rotation so that you don't have to reinvent the wheel each time.

NOTE: However, any changes that are made to the schedule that was copied will apply to all schedules that are base on that template.

The Copy Schedule feature allows you to copy a previously defined Template. This step is the first step in copying a schedule.

1. Navigate to the *Schedule* tab of the *Configure Employee* window. See ***Configure Employee Schedules***, page 211.
2. Check the **Template** box. The *Define Template* dialog box will open.

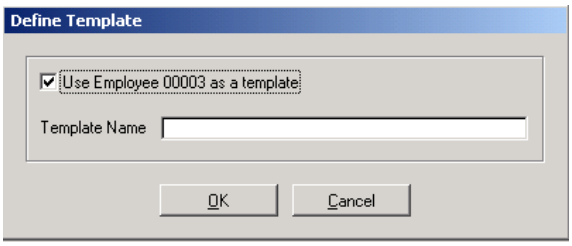


Figure 189: Employee Schedule Template

3. Check the **Use Employee as template** box.
4. Enter a name for this template. Try to make it as descriptive as possible and avoid using employee names, as it may be difficult to remember what type of schedule the employee has.
5. Click **OK** to commit the changes and return to the *Schedule* screen.

Copy an Employee Schedule Template

The Copy Schedule feature allows you to copy a previously defined Employee Schedule Template. See ***Create an Employee Schedule Template***.

1. Navigate to the *Schedule* tab of the *Configure Employee* window. See ***Configure Employee Schedules***, page 211.
2. Click the **Copy** button. The *Schedule Copy Details* dialog box will open.

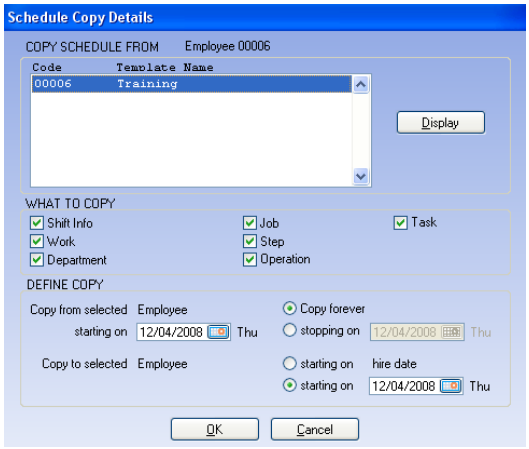


Figure 190: Copy Schedule Details

3. Fill in the settings as appropriate:

Setting	Definition
Code	Displays the code of the available Template.
Template Name	Displays the name of the available Template.
Display	Click this button to display the details of the selected Template.
What to Copy	These settings define what will be copied.
Shift Info	Check this box to copy scheduled starting and stopping times.
Work	Check this box to copy which days are selected for Work.
Department	Check this box to copy the Department assignments.
Job	Check this box to copy the Job assignments.
Step	Check this box to copy the Step assignments.
Operation	Check this box to copy the Operation assignments.
Task	Check this box to copy the Task assignments.
Define Copy	These settings define when the template will be copied.
Copy From	These settings define the date range that will be copied from.
Starting On	Enter the date from which you wish to copy forward.

Setting	Definition
Copy forever	Select this option to copy the selected template from the Starting on point forward forever.
Stop On	Select the option to copy only up to a certain date. Enter the date in the space provided.
Copy to	These settings define the date range that will be copied to.
Starting on hire date	Select this option to "paste" the copied schedule starting from the employee's hire date forward.
Starting on date	Select this option to "paste" the copied schedule from a user-defined date forward. Enter the date in the space provided.

4. Click **OK** to commit the changes and return to the *Schedule* screen.

Employee Transactions Tab

The *Transaction* tab displays the individual punches for the employee

NOTE: Tasks associated with the Transactions tab, such as editing and adding punches, are covered in their own section. See ***Timecard*** and ***Transaction Maintenance***, page 251.

Description

5. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
6. Click the *Transactions* tab to display the following information:

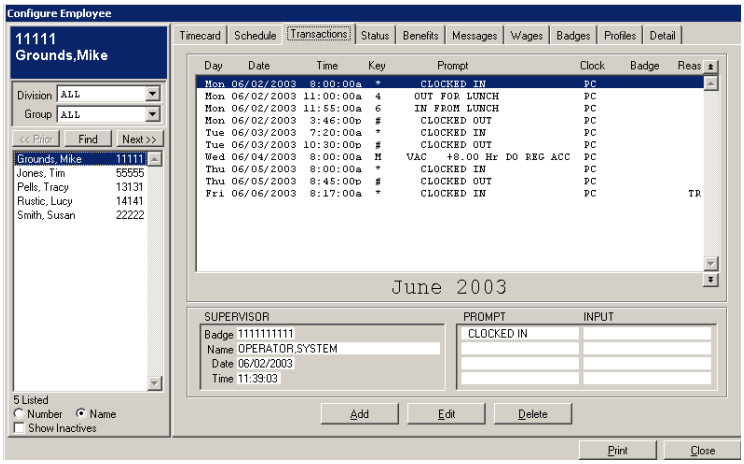


Figure 191: Configure Employee: Transaction tab

Setting	Definition
Day	Displays the day of the transaction.
Date	Displays the date of the transaction.
Time	Displays the actual time of the transaction.
Key	Displays the time clock function key pressed to generate the transaction. (i.e., * for Clock In for day, etc.)
Prompt	Displays the function prompt for the transaction.
Clock	Displays the number of the clock at which the transaction was recorded. **NOTE**: No clock number will display if the transaction was entered by a supervisor through the Genesis Pro software.
Badge	Displays the employee's badge number used for this transaction.
Reason	Displays the reason code associated with the corresponding transaction.

Setting	Definition
Supervisor	This field shows audit trail information, and displays the name and number of the supervisor who edited this transaction, if any.
Prompt	Displays the function prompt for the transaction.
Input	Displays any additional data entered with the transaction, such as a Department number, the number of pieces produced, etc.
Add/Edit/Delete	For more information on adding, editing and deleting transactions, see ***Adding and Editing Transactions***, page 253, and ***Deleting Transactions***, page 263.

Employee Status Tab

The *Status* tab displays the employee's current work status with the company

Configure Employee Status

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Status* tab to display the following information:

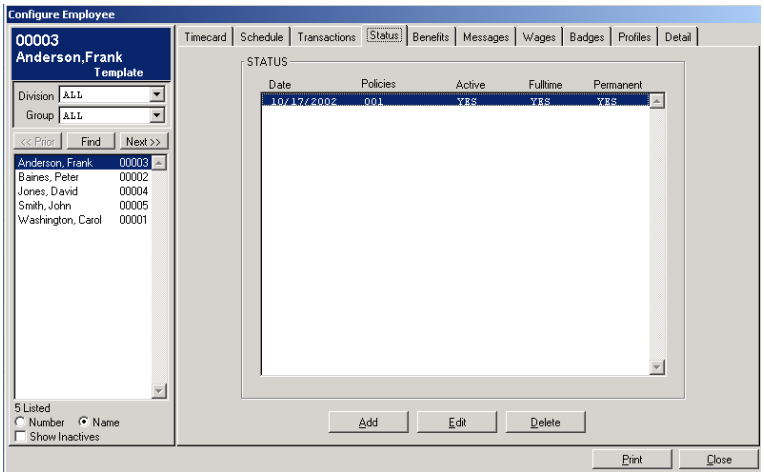


Figure 192: Configure Employee: Status tab

Setting	Definition
Date	Enter the effective date of the status.
Policies	Select the Policy to be assigned to this employee.
Active	Select whether the employee is ***Active*** or ***Inactive*** as of the effective date.

Setting	Definition
Fulltime	Select whether the employee is ***Full Time*** or ***Part Time*** as of the effective date.
Permanent	Select whether the employee is a ***Permanent*** or ***Temporary*** employee as of the effective date.

Add Employee Status

When an employee changes Status, it is recommended that you add a new Status entry rather than editing the existing Status. This enables you to keep a history of Status changes throughout the employee's work history.

1. Navigate to the *Status* tab of the *Configure Employee* window.
2. Click the **Add** button to add a new Status. The *Status Maintenance* dialog box will open:

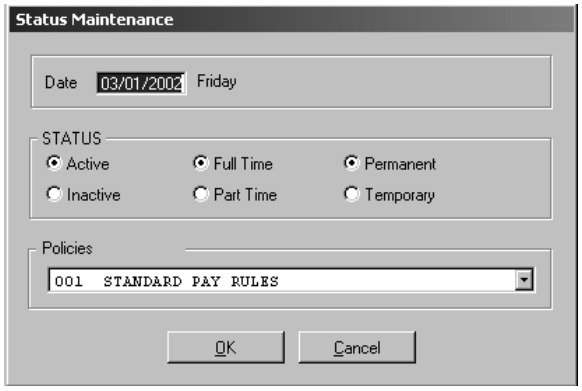


Figure 193: Adding a new Status

3. Fill in the settings as appropriate:

Setting	Definition
Date	Enter the date that this Status change becomes effective.
Active/Inactive	Choose whether the employee is Active or Inactive as of the selected date. **Active** indicates that the employee is currently working for the company. **Inactive** indicates that the employee is not currently working for the company, perhaps because of a leave of absence or termination.
Full Time/Part Time	Choose whether the employee is **Full Time** or **Part Time** as of the selected date.
Permanent/Temporary	Choose whether the employee is **Permanent** or **Temporary** as of the selected date.
Policies	Select the Policy that will apply to this employee as of the effective date.

4. Click **OK** to commit the changes and return to the *Status* screen. The new Status will be added to the list.

Edit Employee Status

If you choose to edit the Employee's Status, the changes will be retroactive to the effective date of the original status entry. Because of this, when an employee changes Status, it is recommended that you add a new Status entry rather than editing the existing Status. This enables you to keep a history of Status changes throughout the employee's work history.

1. Navigate to the *Status* tab of the *Configure Employee* window. See ***Configure Employee Status***, page 221.
2. Highlight the Status entry you wish to edit.
3. Click the **Edit** button. The *Status Maintenance* screen will become available for you to edit.
4. Edit the settings as described in the *Add Employee Status* section.
5. Click **OK** to commit the changes and return to the *Status* screen.

Delete Employee Status

You may wish to delete a Status entry that has been added in error. One Status entry must always exist, thus you will not be able to delete if there is only one Status entry.

1. Navigate to the *Status* tab of the *Configure Employee* window. See ***Configure Employee Status***, page 221.
2. Highlight the Status you wish to delete.
3. Click the **Delete** button. You will be prompted:

Figure 194: Deletion Confirmation

4. Click **OK** to confirm the deletion and return to the *Status* screen.

Employee Benefits Tab

The *Benefits* tab reflects the selected employee's current benefit balances. The information and options on this tab will be slightly different if you have purchased **Benefit Accruals** than with **Benefit Entitlement**. Both options are described below: **Benefit Entitlement** is first, followed by **Benefit Accruals**.

Benefit Entitlement: Configure

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Benefits* tab to display the following information:

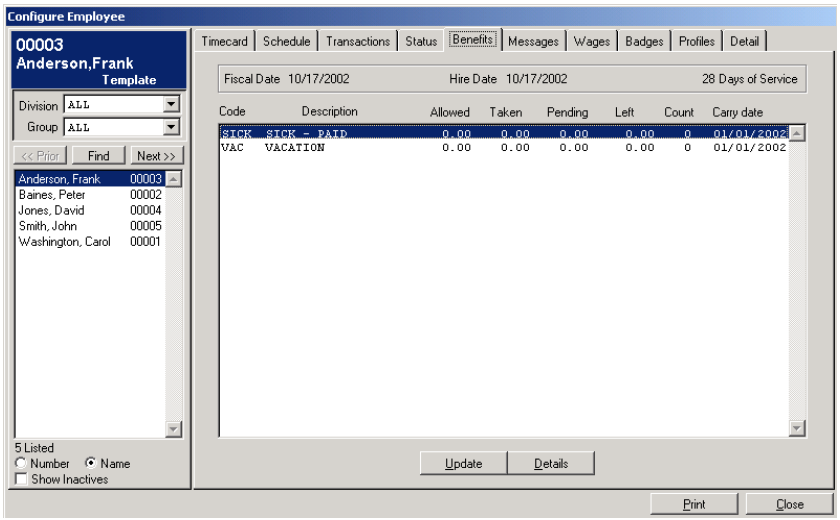


Figure 195: Configure Employee: Benefits tab

Setting	Definition
Fiscal Date	Displays the employee's ***Fiscal Date*** (set on the *Detail* tab), for information purposes.
Hire Date	Displays the employee's ***Hire Date*** (set on the *Detail* tab), for information purposes.
Days of Service	Displays the number of ***Days of Service*** the employee has, for information purposes.
Code	Displays the category code of the benefit (i.e., VAC, SICK, etc.).
Description	Displays the category name of the benefit (i.e., Vacation, Sick, etc.)
Given	Displays the number of hours the employee has been granted through Benefit Entitlement.
Taken	Displays the number of hours of the benefit the employee has already taken. This number is calculated from the ***Miscellaneous*** entries on the employee's time card.

Setting	Definition
Pending	Displays the number of hours of the benefit the employee will take in the future (within the current pay period).
Left	Displays the number of hours left. This is calculated by subtracting the ***Taken*** and ***Pending*** amounts from the ***Allowed***, as follows: **Left = Given - (Taken + Pending)**
Count	Displays the number of individual days on which the benefit time was taken or is pending.
Details button	Click this button to display the individual entitlement transactions for this employee.

Benefit Entitlement: Employee Benefit Details

1. Navigate to the *Benefits* tab of the *Configure Employee* window.
2. Highlight the benefit Category you wish to view.
3. Click the **Details** button. The *Benefit Details* screen for the selected Category will open.

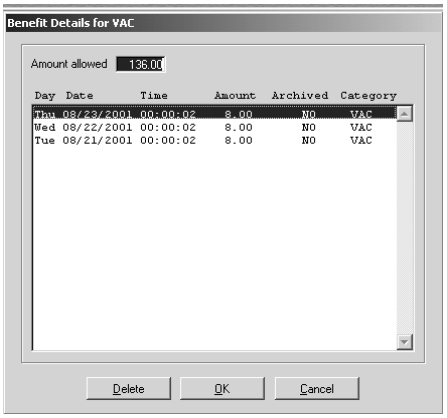


Figure 196: Benefit Entitlement Details

4. The *Benefit Details* dialog box contains the following information:

Setting	Definition
Day	Displays the day on which the time was taken.
Date	Displays the date on which the time was taken.
Time	Displays the time at which the time was taken.
Amount	Displays the number of hours taken.

Setting	Definition
Archived	Indicates whether these transactions are in a data set that has already been archived. (For more information on Archiving, see ***Archive***, page 417).
Category	Displays the category of time taken.

Benefit Entitlement: Grant Benefit Time

With Benefit Entitlement, you manually enter the amount of hours given for each Benefit Category. This is a one-time entry.

1. Navigate to the *Benefits* tab of the *Configure Employee* window.
2. Highlight the benefit Category you wish to grant.
3. Click the **Details** button. The *Benefit Details* screen for the selected Category will open.

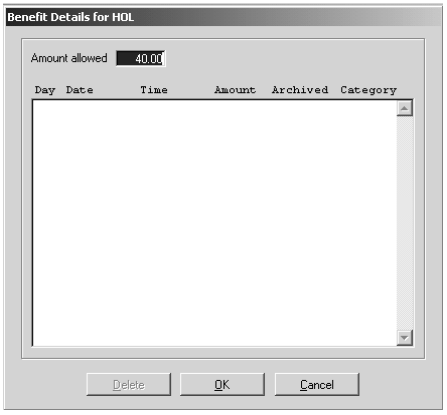


Figure 197: Benefit Details

4. Enter the amount of time you wish to grant in the **Amount Allowed** box.
5. Click **OK** to commit the change and return to the *Benefits* screen.

Benefit Entitlement: Delete a Detail

1. Navigate to the *Benefits* tab of the *Configure Employee* window.
2. Click the **Details** button. The *Benefit Details* screen will display.
3. Highlight the item you wish to delete.
4. Click the **Delete** button. You will be prompted:

Figure 198: Deletion Confirmation

5. Click **OK** to confirm the deletion.
6. Click **OK** to confirm the Archive message.
7. Click **Close** to return to the *Benefits* screen.

Benefit Accruals: Configure

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Benefits* tab to display the following information:

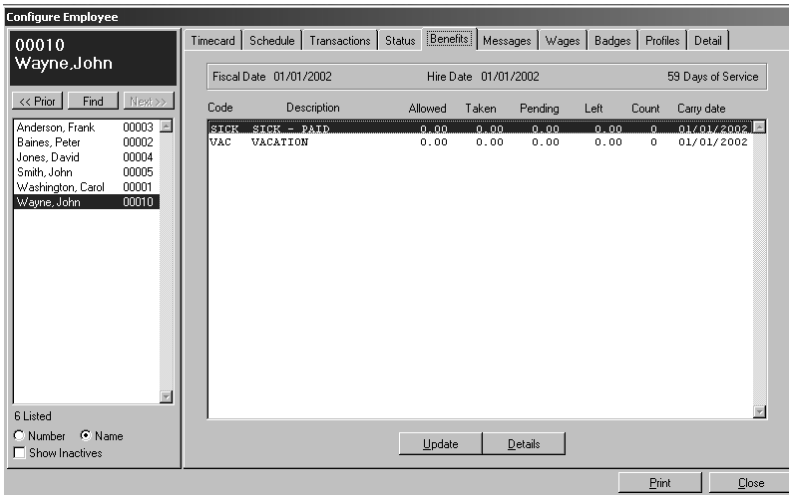


Figure 199: Configure Employee: Benefits tab

Setting	Definition
Fiscal Date	Displays the employee's ***Fiscal Date*** (set on the *Detail* tab), for information purposes.
Hire Date	Displays the employee's ***Hire Date*** (set on the *Detail* tab), for information purposes.
Days of Service	Displays the number of ***Days of Service*** the employee has, for information purposes.
Code	Displays the category code of the benefit (i.e., VAC, SICK, etc.).
Description	Displays the category name of the benefit (i.e., Vacation, Sick, etc.)
Allowed	Displays the number of hours the employee has either been granted or earned. This number is based on the ***Benefit Accrual*** settings (if applicable) or can be manually edited to grant Benefit Entitlement.
Taken	Displays the number of hours of the benefit the employee has already taken. This number is calculated from the ***Miscellaneous*** entries on the employee's time card.

Setting	Definition
Pending	Displays the number of hours of the benefit the employee will take in the future (within the current pay period).
Left	Displays the number of hours left. This is calculated by subtracting the ***Taken*** and ***Pending*** amounts from the ***Allowed***, as follows: **Left = Allowed - (Taken + Pending)**
Count	Displays the number of individual days on which the benefit time was taken or is pending.
Carry Date	Displays the date on which the benefits will roll over, also known as the ***Reference Date*** or ***Reset Date***.
Update button	Click this button to update the benefit calculations to the current day for this employee.
Details button	Click this button to display the individual accrual or entitlement transactions for this employee. For more information, see ***Benefit Accruals***, page 146.

Benefit Accruals: Update Employee Benefits

Genesis Pro will automatically update employee benefit accruals to the current day. However, if you make a change the Benefit Accrual rule assigned to the employee, or change the settings of the rule, you may wish to "force" Genesis Pro to update.

1. Navigate to the *Benefits* tab of the *Configure Employee* window. See ***Benefit Accruals: Configure***, page 227.
2. Click the **Update** button. This employee's benefits will update and the screen will refresh.

Benefit Accruals: Employee Benefit Details

It is possible to view a detailed schedule of how much benefit time the employee has earned and when it was posted.

1. Navigate to the *Benefits* tab of the *Configure Employee* window. See ***Benefit Accruals: Configure***, page 227.
2. Click the **Details** button. The *Benefit Details* screen will display.

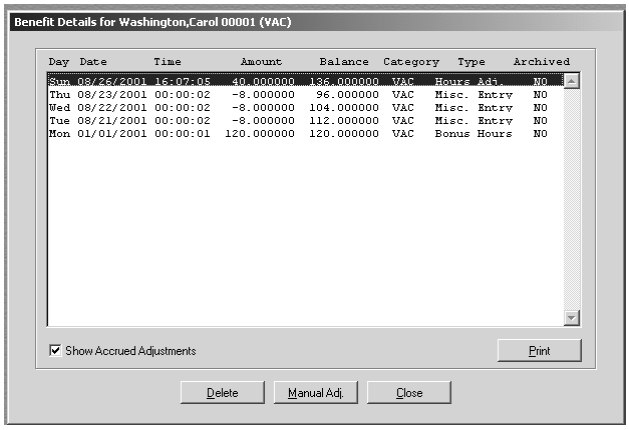


Figure 200: Benefit Details

3. The *Benefit Details* dialog box contains the following information:

Setting	Definition
Day	Displays the day on which the time was posted or taken.
Date	Displays the date on which the time was posted or taken.
Time	Displays the time at which the time was posted or taken.
Amount	Displays the number of hours posted or taken.
Balance	Displays the running balance after the transaction.
Category	Displays the Category of the benefit time.
Type	Displays what type of benefit transaction it was. **Bonus Hours** indicates time earned or accrued. **Misc. Entry** Indicates time taken. **Hours Adj.** Indicates a manual adjustment. **Balance Adj.** Indicates a Balance Adjustment
Archived	Indicates whether these transactions are in a data set that has already been archived. (For more information on Archiving, see ***Archive***, page 417).
Show Accrued Adjustments	Check this box to display the adjustments that have been made to accrued Benefits.
Manual Adj. Button	Click this button to make a manual adjustment. For more information see ***Manual Benefit Adjustment,*** page 230.

4. Click **OK** to close the *Benefit Details* screen.

Benefit Accruals: Manual Benefit Adjustment

It is possible to make manual adjustments to an employee's Benefit Entitlement. These adjustments can be additions or deductions to the employee's available benefits. You can also use this feature to zero out the employee's balance, called a balance adjustment.

1. Navigate to the *Benefits* tab of the *Configure Employee* window. See ***Benefit Accruals: Configure***, page 227.
2. Click the **Details** button. The *Benefit Details* screen will display.
3. Click the **Manual Adj.** Button. The *Manual Adjustment* dialog box will open.

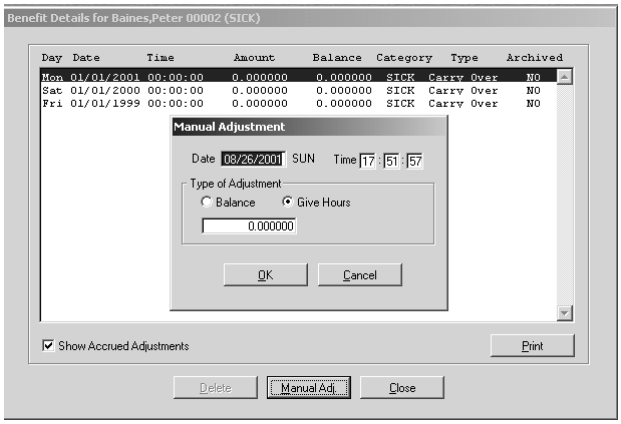


Figure 201: Manual Benefit Adjustment

4. Fill in the settings as appropriate:

Setting	Definition
Date	Enter the Date on which the adjustment should be posted.
Time	Enter the time at which the adjustment should be posted.
Type	Select the type of adjustment to be made. **Given**: Grants the employee the number of hours entered in the Amount field. **Balance**: Adjusts the employee's Allowed field value to cause the current Left balance to reflect the number of hours entered in the Amount field. For example, if the Employee had taken 40 hours already and you wanted their balance to reflect 40 hours left, Genesis Pro would adjust the Allowed to 80 (80 Allowed – 40 Taken = 40 Left).
Amount	Enter the amount of the adjustment. This number can be positive (for an addition) or negative (for a deduction).

5. Click **OK** to commit the changes and return to the *Benefit Details* screen.
6. Click **Close** to return to the *Benefits* screen.

Benefits Accrual: Delete a Manual Adjustment

1. Navigate to the *Benefits* tab of the *Configure Employee* window. See ***Benefit Accruals: Configure***, page 227.
2. Click the **Details** button. The *Benefit Details* screen will display.
3. Highlight the Adjustment you wish to delete.
4. Click the **Delete** button. You will be prompted:

Figure 202: Deletion Confirmation

5. Click **OK** to confirm the deletion.
6. Click **Close** to return to the *Benefits* screen.

Employee Messages Tab

The *Messages* tab allows you to create a customized message that will display when this employee punches at the clock

Configure

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Messages* tab to display the following information:

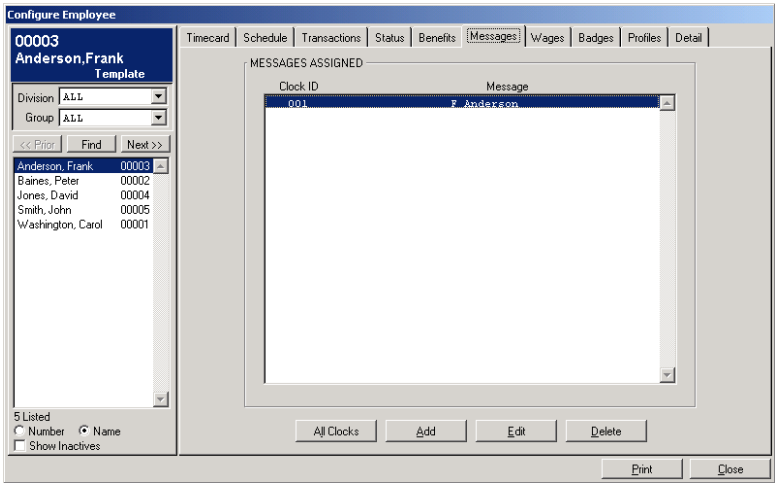


Figure 203: Configure Employee: Messages tab

Setting	Definition
Clock Id	Displays the number of the clock at which this message will display.
Message	Displays the message. The message can be up to 16 characters and the default is the employee's first initial and last name.
All Clocks Button	This opens the All Clocks dialog box. Here you can create a message, and assign it to all available clocks.

Add a Message

You can send a message to each clock individually, or to all clocks that the employee uses.

To a Single Clock

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the **Add** button to add a new message to send to an individual clock. The *Message Assignment* dialog box will open.

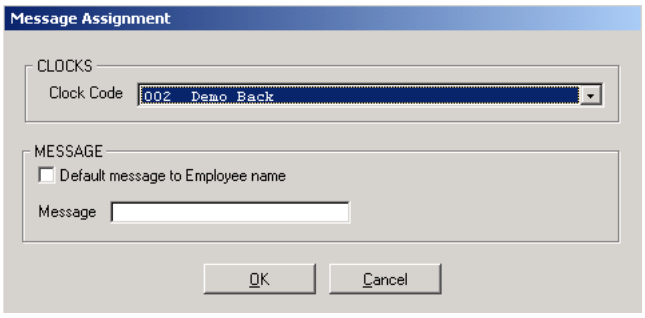


Figure 204: Adding a new Message

3. Select the clock to which this message should be sent.
4. Enter the message you wish to send. Up to 16 characters may be entered. Or check the ***Default message to Employee name*** to send the employee's First Initial and Last Name.
5. Click **OK** to commit the changes and return to the *Messages* screen.

To All Clocks

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the **All Clocks** button to add a new message to all clocks this employee uses. The *Message Assignment* dialog box will open.

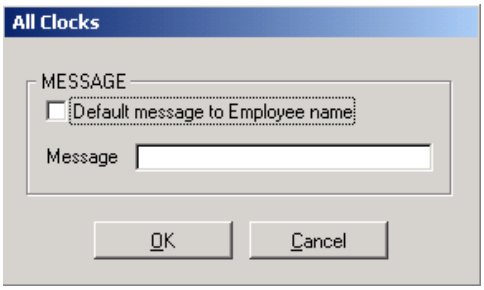


Figure 205: Add a Message to All Clocks

3. Enter the message you wish to send. Up to 16 characters may be entered. Or check the ***Default message to Employee name*** to send the employee's First Initial and Last Name.
4. Click **OK** to commit the changes and return to the *Messages* screen.

Edit a Message

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Highlight the Message you wish to edit.
3. Click the **Edit** button.
4. Edit the settings as described in the *Add a Message* section.
5. Click **OK** to commit the changes and return to the *Messages* screen.

Delete a Message

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Highlight the Message you wish to delete.
3. Click the **Delete** button. You will be prompted:

Figure 206: Deletion Confirmation

4. Click **OK** to confirm the deletion.

Employee Wages

The *Wages* tab specifies the FLSA status (exempt or non-exempt) and pay rate(s) for the employee. For non-exempt employees, wages can either be Global or associated with the Department, Job, Step, Operation or Task on which the employee works. All options are described in the following sections.

Configure Employee Wages

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Wages* tab to display the following information:

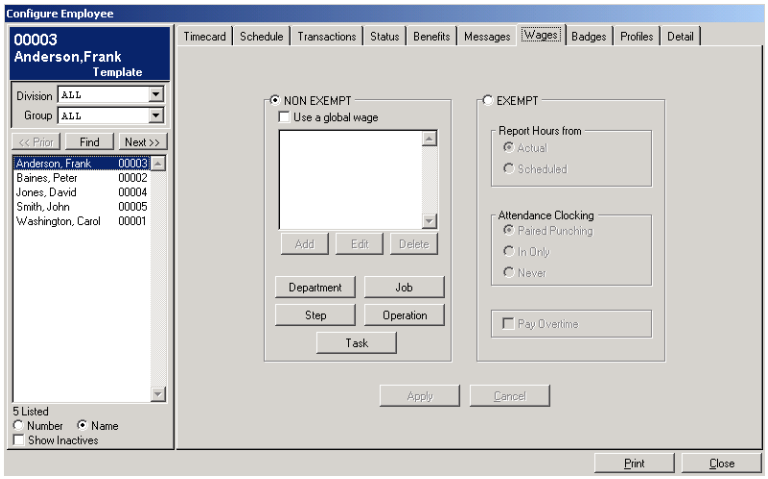


Figure 207: Configure Employee: Wages tab

Setting	Definition
Non-Exempt	Check this option to indicate that the employee is Non-Exempt.
Use Globa/ Wage	Check this option to assign the employee a fixed standard wage regardless of which department, job, step, operation or task he/she works for. If un-checked the employee will earn a different wage based on the department, job, step, operation, or task they work in. For more information see the Department, Job, Step, Operation, or Task buttons in this section.
Department	Click this button to set a wage that applies whenever the employee works for a particular Department. This can be used to pay different rates when the employee performs different functions.
Job	Click this button to set a wage that applies whenever the employee works for a particular Job. This can be used to pay different rates when the employee performs different functions.

Setting	Definition
Step	Click this button to set a wage that applies whenever the employee works for a particular Step. This can be used to pay different rates when the employee performs different functions.
Operation	Click this button to set a wage that applies whenever the employee works for a particular Operation. This can be used to pay different rates when the employee performs different functions.
Task	Click this button to set a wage that applies whenever the employee works for a particular Task. This can be used to pay different rates when the employee performs different functions.
Exempt	Check this option to indicate the employee is Exempt.
Report Hours From	Genesis Pro can report exempt employees' hours either from actual punches or from their schedule, regardless of their punches. Check **Actual** to have Genesis Pro report the hours as they are punched at the clock. Check **Schedule** to have Genesis Pro report hours from the employee's schedule. The Attendance Clocking settings will become available when this option is checked and need to be configured
Attendance Clocking	These settings become available when the Report Hours From Schedule option is checked. Check **Paired Punching** to indicate that the employee should punch In and Out, but Genesis Pro will ignore the actual times of the punches and report the scheduled times and duration. Check **In Only** to indicate that the employee only needs to punch In each day and Genesis Pro will report the scheduled times and duration. Check **None** to indicate that Genesis Pro should automatically report the scheduled times and duration without the employee having to punch at all.
Pay Overtime	Check this option to make the employee eligible for overtime, based on the Policy to which the employee is assigned.

Add a Global Wage

1. Navigate to the *Wages* tab of the *Configure Employee* window. See ***Configure Employee Wages***, page 234.
2. Select the **Non-Exempt** option.
3. Check the **Use Global Wage** option.
4. Click the **Add** button to add a new Global Wage. The *Wage Details* dialog box will open.

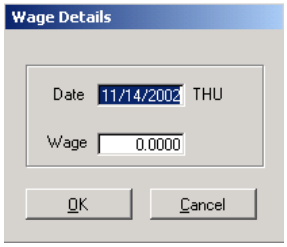


Figure 208: Adding a new Holiday

5. Enter the date on which this wage takes effect.
6. Enter the amount of the hourly wage.
7. Click **OK** to commit the changes and return to the *Wages* screen.

Edit a Global Wage

1. Navigate to the *Wages* tab of the *Configure Employee* window. See ***Configure Employee Wages***, page 234.
2. Highlight the wage you wish to edit
3. Click the **Edit** button. The *Wage Details* dialog box will open.
4. Enter the amount of the hourly wage.
5. Click **OK** to commit the changes and return to the *Wages* screen.

Delete a Global Wage

1. Navigate to the *Wages* tab of the *Configure Employee* window. See ***Configure Employee Wages***, page 234.
2. Highlight the wage you wish to delete.
3. Click the **Delete** button. You will be prompted:

Figure 209: Deletion Confirmation

4. Click **OK** to confirm the deletion.

Add an Employee Level Wage

Employee Level Wages specify the wage the employee makes when working for a specific Department, Job, Step, Operation or Task. In this section, Level refers to the Department, Job, Step, Operation, or Task, as appropriate. The procedure is the same regardless of which level you are defining, thus they are all described together.

1. Navigate to the *Wages* tab of the *Configure Employee* window. See ***Configure Employee Wages***, page 234.
2. Select the **Non-Exempt** option.
3. Click the **Department, Job, Step, Operation, or Task** button, depending upon choice. The *Level Wage Details* dialog box will open.

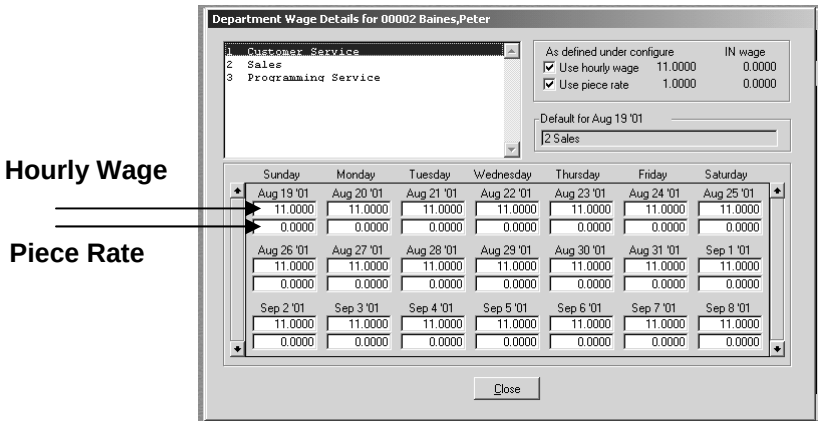


Figure 210: Adding a new Level Wage

4. The *Level Wage Details* dialog box contains the following information:

Setting	Definition
Item	This field will be pre-populated with the Departments, Jobs, Steps, Operations and Tasks defined in the system. Select the item you wish to configure.
Use Hourly Wage	The value for this option is defined in the Configure Department, Job, Step, Operation, or Task dialog box. It will be checked and will reflect the pre-defined wage if the ***Use Hourly Wage*** setting is checked in the Department, Job, Step, Operation, or Task dialog box for this item.
Use Piece Rate	The value for this option is defined in the Configure Department, Job, Step, Operation, or Task dialog box. It will be checked and will reflect the pre-defined wage if the ***Use Piece Rate*** setting is checked in the Department, Job, Step, Operation, or Task dialog box for this item.

Setting	Definition
Calendar	The calendar is used both to enter the wage amount and to indicate the effective date of the wage. Wages will auto fill from the date entered forward. Always enter the wage on the date, which you wish it to take effect.
Hourly Wage	The ***Hourly*** amount field is the top field in the calendar. Enter the wage on the date, which it becomes effective.
Piece Rate Wage	The ***Piece Rate*** amount field is the lower field in the calendar. Enter the wage on the date on which it becomes effective.

5. Click **Close** to commit the changes and return to the *Wages* screen.

Edit an Employee Level Wage

1. Navigate to the *Wages* tab of the *Configure Employee* window. See ***Configure Employee Wages***, page 234.
2. Select the **Non-Exempt** option.
3. Click the **Department, Job, Step, Operation, or Task** button, depending upon choice. The Level Wage Details dialog box will open.
4. Edit the settings as described in the *Add an Employee Level Wage* section.
5. Click **Close** to commit the changes and return to the *Wages* screen.

© January 2009 Time America, Inc.

Employee Badges Tab

The *Badges* dialog box is used to assign the employee's badge number.

Configure Employee Badges

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Badges* tab to display the following information:

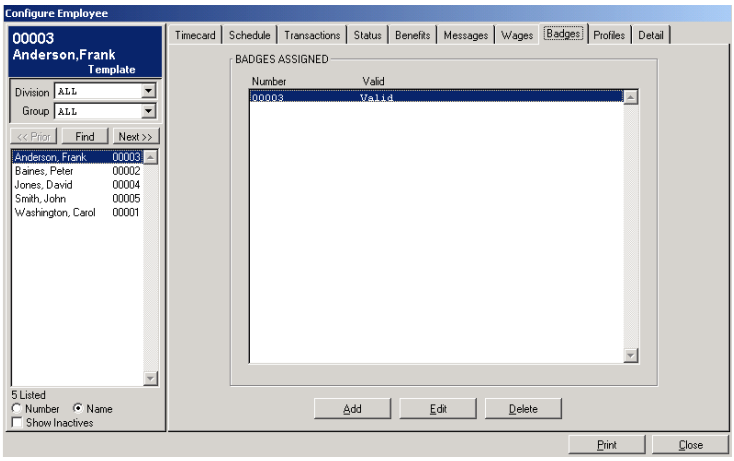


Figure 211: Employee Maintenance: Badges tab

Setting	Definition
Number	Displays the badge number assigned to the employee.
Valid	Indicates whether or not the badge is valid and can be used by this employee. When an employee is assigned another badge, make the original badge invalid so that this employee cannot use it any longer.

Add a Badge

1. Navigate to the *Badges* tab of the *Configure Employee* window. See ***Configure Employee Badges***, page 239.
2. Click the **Add** button to add a new Badge. The *Assign Badge* dialog box will open.

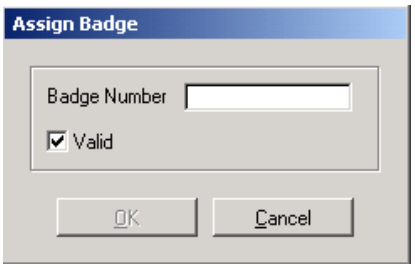


Figure 212: Adding a new Badge

3. Enter the Badge number you wish to assign to this employee and press **Tab**.

4. Check the ***Valid*** box to indicate this badge is in use.
5. Click **OK** to commit the changes and return to the *Badges* screen.

Edit a Badge

It is possible to edit a Badge in order to make it Invalid for this employee (cannot be used by this employee to punch). The badge number cannot be changed. If you need to change a badge number, it is best to make the old badge number inactive or delete it, and add a new one.

1. Navigate to the *Badges* tab of the *Configure Employee* window. See ***Configure Employee Badges***, page 239.
2. Click the **Edit** button. The *Assign Badge* dialog box will open.
3. Uncheck the ***Valid*** box to make the Badge invalid.
4. Click **OK** to commit the changes and return to the *Badges* screen.

Delete a Badge

1. Navigate to the *Badges* tab of the *Configure Employee* window. See ***Configure Employee Badges***, page 239.
2. Highlight the Badge you wish to delete.
3. Click the **Delete** button. You will be prompted:

Figure 213: Deletion Confirmation

4. Click **OK** to confirm the deletion and return to the *Badges* screen.

Employee Profiles Tab

The *Profiles* tab is used to assign Profile Lockouts and clock access to the employee. The Profile Lockout is first assigned to the clock, and the clock is then assigned to the employee. This makes the clock's profile available to the employee. You are then able to choose which Profile Schedules apply for each day of the week.

Configure Employee Profiles

5. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
6. Click the *Profiles* tab to display the following information:

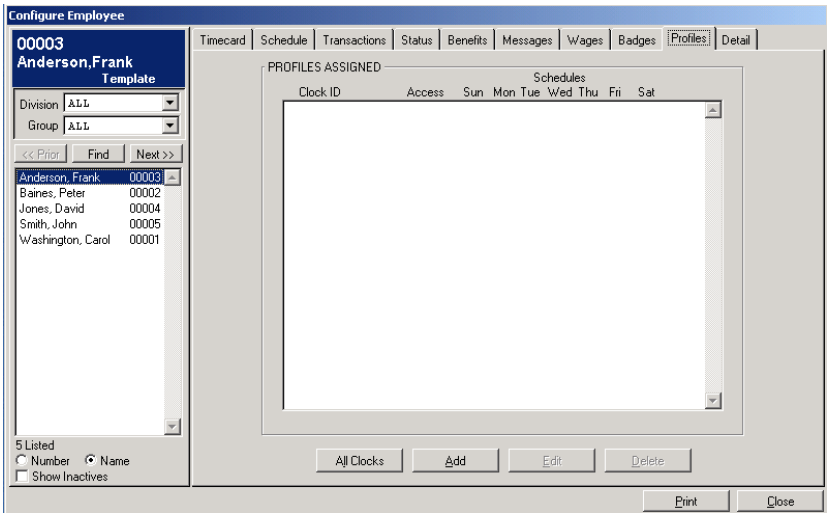


Figure 214: Configure Employee: Profiles tab

Setting	Definition
Clock ID	Displays the clock(s) assigned to this employee.
Access	Indicates whether the employee can use this clock.
Day of Week	Indicates the Profile Schedule selected for each day of the week.

Add a Profile

An employee can have different profile configurations at different clocks. You can add the profile for each clock individually, or to all clocks that the employee uses at once.

To a Single Clock

1. Navigate to the *Profiles* tab of the *Configure Employee* dialog box. See ***Configure Employee Profiles***, page 240.
2. Click the **Add** button to add a new Profile assignment. The *Profile Assignment Detail* dialog box will open.

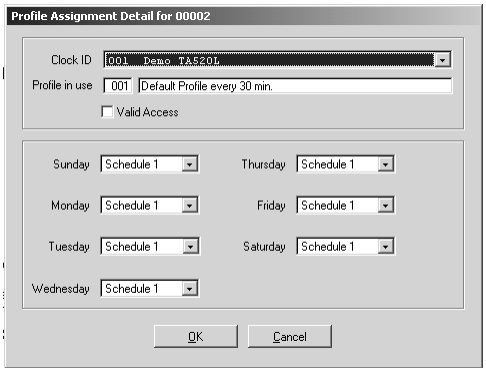


Figure 215: Profile Assignment Detail

3. Fill in the settings as appropriate:

Setting	Definition
Clock ID	Select the clock this employee will use.
Profile in Use	Displays the profile assigned to the clock selected. This field cannot be edited.
Valid Access	Check this box to make this clock accessible to the employee.
Day of Week	Select the Profile Schedule desired for each day of the week.

4. Click **OK** to commit the changes and return to the *Profiles* screen.

To All Clocks

1. Navigate to the *Profiles* tab of the *Configure Employee* dialog box. See ***Configure Employee Profiles***, page 240.
2. Click the **All Clocks** button. The *All Clocks Profile Assignment Detail* dialog box will open.

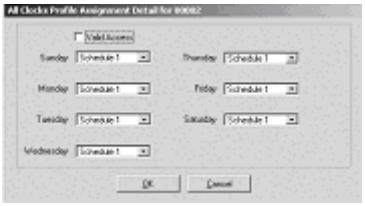


Figure 216: All Clocks Profile Assignment

3. Fill in the settings as appropriate:

Setting	Definition
Valid Access	Check this box to make this clock accessible to the employee.
Day of Week	Select the Profile Schedule desired for each day of the week.

4. Click **OK** to commit the changes and return to the *Profiles* screen.

Edit a Profile

1. Navigate to the *Profiles* tab of the *Configure Employee* dialog box. See ***Configure Employee Profiles***, page 240.
2. Highlight the profile you wish to edit.
3. Click the **Edit** button. The *Profile Assignment Detail* dialog box will open.
4. Edit the settings as described in the *Add a Profile* section.
5. Click **OK** to commit the changes and return to the *Profiles* screen.

Delete a Profile

1. Navigate to the *Profiles* tab of the *Configure Employee* window. See ***Configure Employee Profiles***, page 240.
2. Highlight the Profile you wish to delete.
3. Click the **Delete** button. You will be prompted:

Figure 217: Deletion Confirmation

4. Click **OK** to confirm the deletion and return to the *Badges* screen.

Employee Clocks Tab

The *Clocks* tab is used to assign Hand Readers and TA7000 clocks to employees. This is necessary because the Hand Reader clocks take measurements of an employee's hand and the TA7000 clocks can be used as fingerprint clocks. Each time the employee punches, the clocks compare the employee's hand and/or fingerprint to the existing template. Employee information, hand templates and fingerprints are stored in the clocks. For this reason, employees must be assigned to a clock so their name and template will be downloaded to the correct clock.

Configure Hand Readers

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Clocks* tab, then click the *Hand Reader* tab to display the following information:

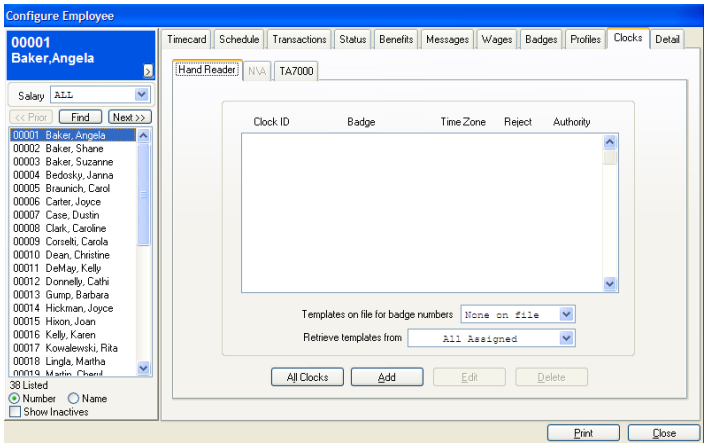


Figure 218: Configure Employee: Clocks tab

Setting	Definition
Clock ID	Displays the Clock ID assigned to each reader.
Badge	Displays employee badge number.
Time Zone	Select the Time Zone (defined on the previous tab) that applies to this employee.
Reject	The reject threshold indicates how closely the hand has to match the original scanned hand template. The lower the number, the more exact the match needs to be.
Authority	The Authority Level defines which clock menus employee can view or use at the clock. 0 is the lowest (employee) and default, 5 is the highest and allows complete at-the-clock setup (supervisor).
Templates on file for Badge Numbers	Displays if the employee has a hand template saved.
Retrieve Templates From	Enter the specific hand reader for individual employee template retrieval.
All Clocks	This opens the All Clocks dialog box. Here you can assign an employee to all hand readers.
Add	Click this button to select hand readers individually.
Edit	Edit the settings assigned to the employee.
Delete	Delete the employee hand reader assignment.

Configure TA7000

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Clocks* tab, then click the *TA7000* tab to display the following information:

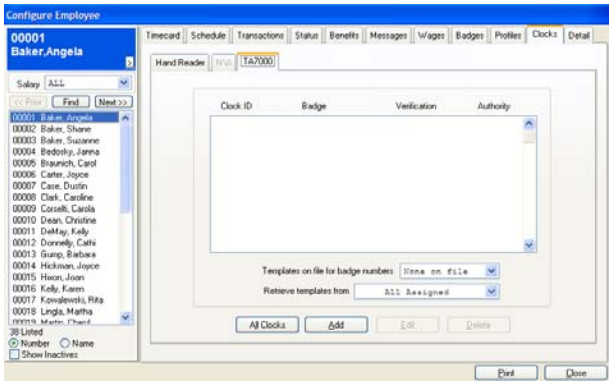


Figure 219: Configure Employee: Clocks tab

Setting	Definition
Clock ID	Displays the Clock ID assigned to each clock.
Badge	Displays employee badge number.
Verification	Displays the verification level, which defines the false read threshold.
Authority	Displays the Authority Level, which defines the clock menus employees can view or use at the clock. The following options are available: Employee, Supervisor or Configuration.
Templates on file for Badge Numbers	Displays if the employee has a fingerprint template saved.
Retrieve Templates From	Enter the specific clock for individual employee fingerprint template retrieval.
All Clocks	This opens the All Clocks dialog box. Here you can assign an employee to all TA7000 clocks.
Add	Click this button to select TA7000 clocks individually.
Edit	Edit the settings assigned to the employee.
Delete	Delete the employee hand reader assignment.

Employee Details Tab

The *Details* tab manages the employee's personnel settings. New employees are also added from this tab.

Configure Employee Details

1. Navigate to the *Configure Employee* window. See ***Configure Employee***, page 204.
2. Click the *Details* tab to display the following information:

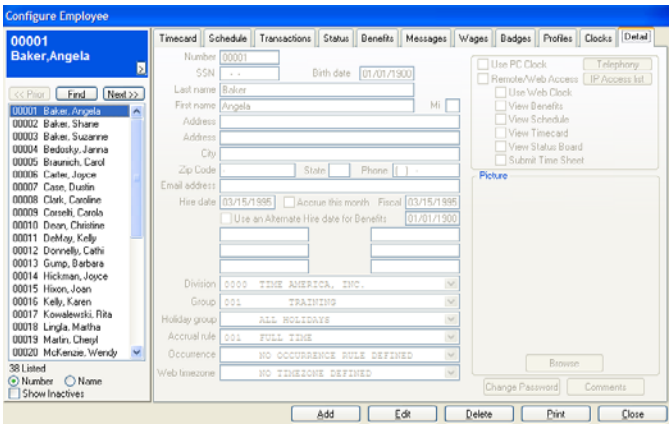


Figure 220: Configure Employee: Details tab

Setting	Definition
Number	This is a required field. Enter a code (from 2 to 10 characters in length) to identify the employee. The code's maximum length and type (numeric or alphanumeric) are defined in the ***System Defaults*** dialog box in *Company Setup*. Numeric fields are zero filled. **NOTE:** Once saved, the employee code cannot be modified, except through **Utilities**.
Social Security	Enter the employee's social security number.
Birth date	Enter the employee's birth date (if desired).
Last Name	Enter the employee's last name.
First Name	Enter the employee's first name.
Middle Initial	Enter the employee's middle initial.
Address	Enter the employee's address. Two lines are available.
City	Enter the employee's City.
Zip	Enter the employee's Zip code.
State	Enter the employee's State.
Phone	Enter the employee's phone number.
Email Address	Enter the employee's email address.
Hire Date	Enter the employee's hire date.

Setting	Definition
Accrue this month	Check this box if benefits should accrue during the first month of employment.
Fiscal Date	Enter the date on which this employee's or your company's fiscal year starts. This date can be used as the ***Reference Date*** on which benefits carry over.
Use Alternative Hire Date for benefits	Use this date to override the *Hire Date* field as the date an employee's benefits should begin.
User-Defined fields	There are six user-defined fields. Enter information as desired. For more information see ***Configure Main Company,*** page 28.
Division	Select the pre-defined Division to which the employee belongs.
Group	Select the pre-defined Group to which the employee belongs.
Holiday group	Select the pre-defined Holiday Group to which the employee belongs. If Holiday Groups were not created you may leave at the default listing of All Holidays.
Accrual Rule	Select the pre-defined Benefits Accrual rule that applies to this employee.
Occurrence	Select the pre-defined Occurrence Rating that applies to this employee.
Web time zone	Select the time zone the employee will be clocking in and out of when using the WebClock. NOTE: This is only available if the Use WebClock option is selected.
Use PC Clock	Allow access to the selected employee for PC Clock. NOTE: The PC Clock module must be purchased.
Allow Remote/Web Access	Allow access to the selected employee for Remote/Web Access.
IP Access List	Enter an IP address to give access to employees punching on the Webclock. Wildcards are okay. NOTE: The WebClock module must be purchased.
Use WebClock	Allow access to the selected employee for Web Clock
View Benefits	Allow the selected employee to view their benefit balances.
View Schedule	Allow the selected employee to view their schedule.
View Timecard	Allow the selected employee to view their timecard.

Setting	Definition
View Status Board	Allow the selected employee to view the Status Board.
Submit Time Sheet	Allow the selected employee to submit work and non-work time.
Picture Browse button	Genesis Pro allows you to display the employee's picture. Click the Browse button to select a picture. **NOTE**: The picture must be in Bitmap (.bmp) format and stored in the Images folder under the GENPRO install directory. **NOTE:** 150 x 150 pixels
Clear Password button	By default an employee's password is blank. If the employee forgets their password the administrator may clear their password by pressing this button.
Comments button	Click on this button to enter text comments for the selected employee.

Add an Employee

Genesis Pro uses an Add Employee wizard to walk you through the steps of adding a new employee. Once you have completed the Detail screen, additional screens will open, one after another, until all the settings for the employee are complete.

1. Navigate to the *Detail* tab of the *Configure Employee* window. See ***Configure Employee Details***, page 245.
2. Click the **Add** button to add a new Employee. The *Detail* tab will become available.
3. Fill in the settings as described in the *Configure Employees Details* section.
4. Click **OK** to commit the changes and continue to the next screen.
5. The *Status* dialog box will open. See ***Employee Status***, page 221.
6. When all settings are complete, click **Close** to continue to the next screen.
7. The *Assignment Start Date* dialog box will open. Choose the date on which you want the employee's schedule to start.

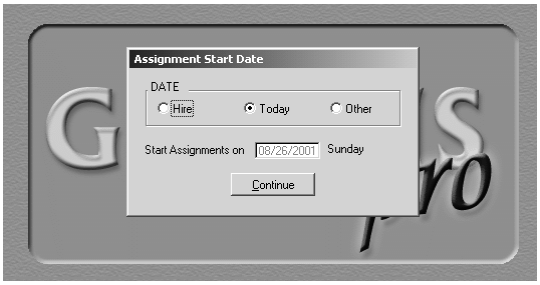


Figure 221: Assignment Start Date

8. When all settings are complete, click the **Continue** button to advance to the next screen.
9. The *Schedule* dialog box will open. See ***Employee Schedule***, page 211.
10. When all settings are complete, click the **OK** button to advance to the next screen.
11. The *Message Assignment* dialog box will open. See ***Employee Messages***, page 231.
12. When all settings are complete, click the **Close** button to advance to the next screen.
13. The *Wage Assignment* dialog box will open. See ***Employee Wages***, page 234.
14. When all settings are complete, click the **OK** button to advance to the next screen.
15. The *Badge Assignment* dialog box will open. See ***Employee Badges***, page 239.
16. When all settings are complete, click the **Close** button to advance to the next screen.
17. The *Profile Assignment* dialog box will open. See ***Employee Profiles***, page 240.
18. When all settings are complete, click the **OK** button to advance to the next screen.
19. The *Clocks* dialog box will open. See ***Employee Clocks***, page 243.
20. When all settings are complete, click the **OK** button to advance to the next screen.
21. You will be returned to the *Detail* tab of the *Configure Employee* window.
22. Click **Close** to exit the Configure Employee dialog box.

Edit an Employee

1. Navigate to the *Detail* tab of the *Configure Employee* window.
2. Highlight the Employee you wish to edit from the list at the side of the screen.
3. Click the **Edit** button. The *Detail* screen will become available for you to edit the selected Employee.
4. Edit the settings as described in the *Configure Employee* section.
5. Click **OK** to commit the changes and return to the *Configure Employee* screen.
6. Click **Close** to exit the *Configure Employee* dialog box.

Delete an Employee

Deleting an employee deletes all of the data relating to that employee throughout the database, including time records.

NOTE: This can cause inaccurate reporting. You cannot undo a delete.

1. Navigate to the *Detail* tab of the *Configure Employee* window.

2. Highlight the Employee you wish to delete from the list at the side of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 222: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Employees* dialog box.

Chapter VIII Timecard and Transaction Maintenance

This section describes the concepts and tasks associated with managing employee time records, including editing and adding time entries.

Online Timecard

The Online Timecard allows you to view, add, edit and delete employee time entries. The Timecard can be accessed from two locations: the Configure Employee dialog box and the Approval Editor.

NOTE: There are slight differences between the Online Timecard tab of the Configure Employee screen and the Online Timecard screen accessed from the Approval Editor. The Online Timecard from the Approval Editor:

- Displays the Attendance Code flags next to the punches.
- Does not provide a way to switch to the Transactions screen.
- Does not offer a Multiple Miscellaneous button.
- Does not print exceptions in different colors.

Accessing the Online Timecard from the Configure Employee Screen

1. Click the **Edit** menu**, Employee**. The *Configure Employee* dialog box will open.
2. The *Timecard* tab will be selected automatically.

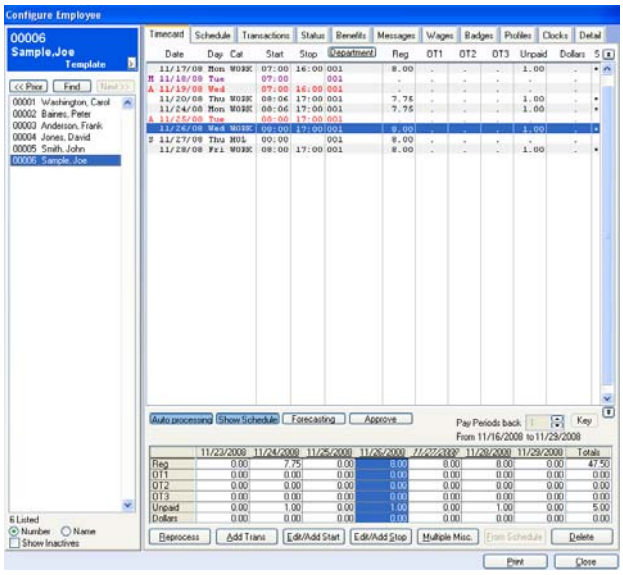


Figure 223: Online Timecard tab (Configure Employee)

The Online Timecard week view at bottom of page now indicates holidays (*italics*), current date (*blue highlight*) and days scheduled to work (*underline date*). Also a double click or right click in the Job Costing field will display all job costing information for that slice of time. Blue backgrounds have been added in the employee screen for easier visibility of an active feature.

Accessing the Online Timecard from the Approval Editor

1. Click the **Edit** menu**, Approval Editor** or click on the . The *Approval Editor* dialog box will open.
2. Double-click an employee's name to open to the *Online Timecard* window.

Figure 224: Online Timecard (Approval Editor)

Navigating in the Online Timecard Tab

By default, the Online Timecard screen displays the current pay period's data. There are two easy techniques for navigating to other pay periods.

NOTE: It may not be possible to edit data in previous pay periods, depending upon your security permissions and the number of editable pay periods settings. For more information, see ***Main Company***, page 28, and ***Configure Users***, page 140.

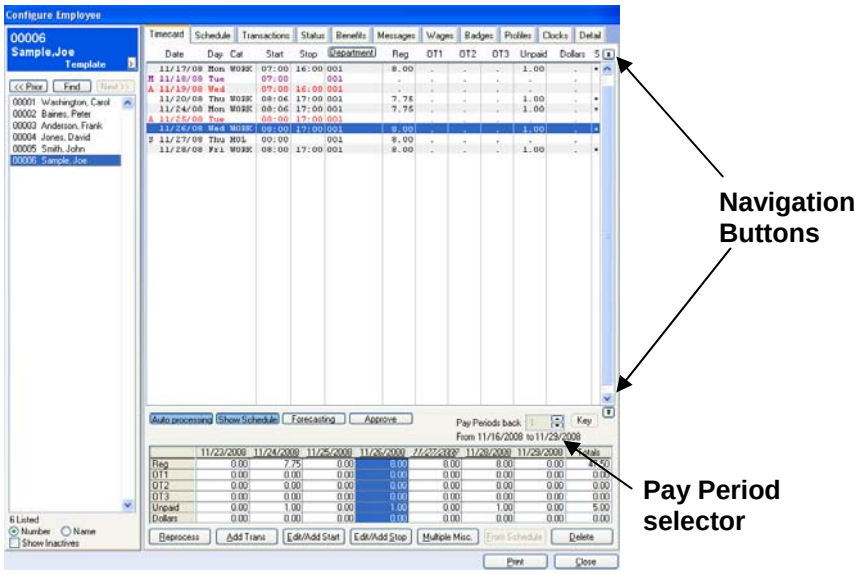


Figure 225: Online Timecard

- **Navigation buttons**: Click the Navigation buttons to scroll to previous and next pay periods. The navigation button at the top of the scroll bar takes you to the previous pay period; the button at the bottom takes you to the next pay period.
- **Pay Period selector**: Use the spin button in the Pay Periods Back box to scroll to a pay period a specified number of periods in the past.

Navigating in the Transactions tab

By default, the Transactions screen displays the current month's data. There is an easy technique for navigating to other months.

NOTE: It may not be possible to edit data in previous months, depending upon your security permissions and the number of editable pay period settings. For more information, see ***Main Company***, page 28, and ***Configure Users***, page 140.

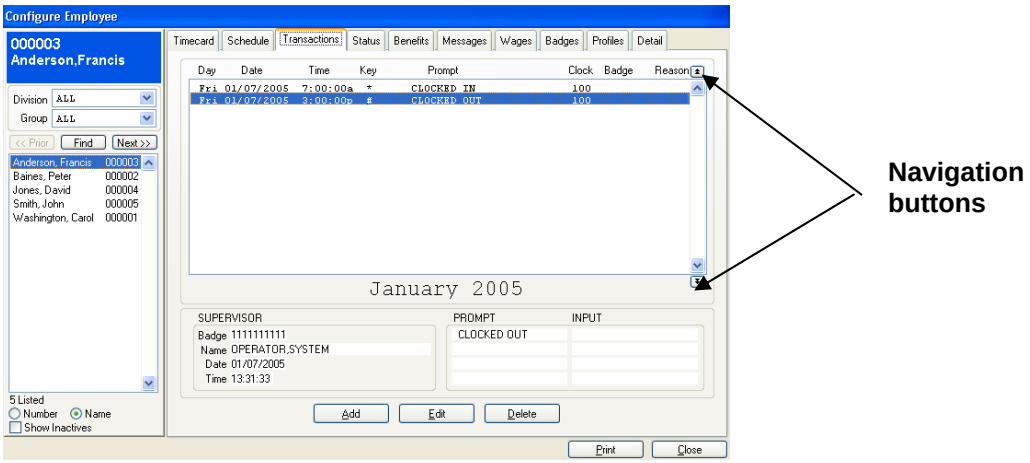


Figure 226: Transactions screen

- **Navigation buttons**: Click the Navigation buttons to scroll to previous and next months. The navigation button at the top of the scroll bar takes you to the previous month; the button at the bottom takes you to the next month.

Adding and Editing Transactions

Adding a transaction enables you to record a time entry on behalf of an employee. For example, you might need to add a missed Clock Out, add a lunch or break, or enter a vacation day.

Examples of transactions are:

Clocked In	Punching In for the day.
Clocked Out	Punching Out for the day.
Swipe and Go	Swipe and go transaction.
Out For Lunch	Punching Out for lunch.
In From Lunch	Punching In from lunch.
Out On Break	Punching Out for break.

In From Break	Punching In from break.
Enter Department	Transferring departments.
Enter Tips	Entering tips.
Miscellaneous	Miscellaneous transactions are used to add or subtract dollars or hours, including vacation and other categories of time, as well as per diem, tips and other categories of dollars.

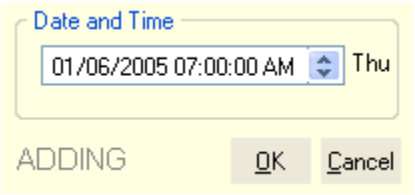
There are several ways to add transactions. All accomplish the same end, but some are easier to use in certain instances. All are described below.

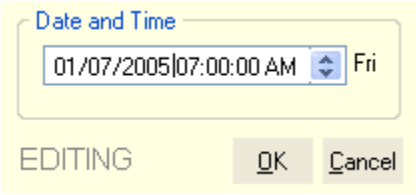
Add Transaction

Transactions can be added from the *Online Timecard* or from the *Transactions* tab of the *Configure Employee* dialog box. The method is the same in both locations.

This option for adding a transaction works best when you are going to manually enter all elements of the transaction.

NOTE: A popup window is available to add/edit Start and Stop entries. The popup window can be accessed by double clicking or a right click in the Start and Stop fields.





1. Navigate to the *Online Timecard* for the employee you wish to edit. See **Online Timecard**, page 251.

   Or navigate to the *Transactions* tab of the *Configure Employee* dialog box and select the employee for whom you wish to add a transaction. See ***Employee Transactions***, page 220.

2. Click the **Add Trans** (*Online Timecard*) or **Add** (*Transactions*) button. The *Transaction Detail* dialog box will open.

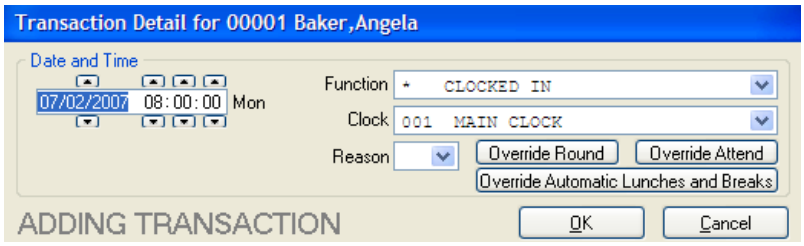


Figure 227: Transaction Detail

3. The *Transaction Detail* dialog box contains the following information:

Setting	Definition
Date	Enter the date for this transaction.

Setting	Definition
Time	Enter the time for the transaction. HH:MM:SS. Enter this in military time.
Function	Select the type for this transaction. The standard options are: • Clocked In • Clocked Out • Out for Lunch • In from Lunch • Enter Department • Enter Category • Approve Overtime • Swipe & Go • Miscellaneous (used for entering absences, vacation, tips and other categories of time and dollars). See **Add Miscellaneous Transaction**. Additional options may appear, depending upon your company and clock configuration.
Clock	Select the clock to which the transaction should be attributed.
Reason	Select the reason code associated with this transaction.
Override Rounding	Check this option to have Genesis Pro ignore the rounding rules for this transaction.
Override Attendance	Check this option to have Genesis Pro ignore the Attendance flags for this transaction.
Override Automatic Lunches and Breaks	Check this option to cancel all automatic lunches and breaks assigned to a specific day. The edit must be initiated from the start time.

4. Click **OK** to commit the changes and return to the *Online Timecard*.

Add Miscellaneous Transaction

Transactions can be added from the *Online Timecard* or from the *Transactions* tab of the *Configure Employee* dialog box. The method is the same in both locations.

This option for adding a transaction works best when you are going to manually enter all elements of the transaction.

1. Navigate to the *Online Timecard* for the employee you wish to edit. See **Online Timecard**, page 251.

   Or navigate to the *Transactions* tab of the *Configure Employee* dialog box and select the employee for whom you wish to add a transaction. See ***Employee Transactions***, page 220.

2. Click the **Add Trans** (*Online Timecard*) or **Add** (*Transactions*) button. The *Transaction Detail* dialog box will open.
3. Select Miscellaneous from the function drop down menu, additional information will open.

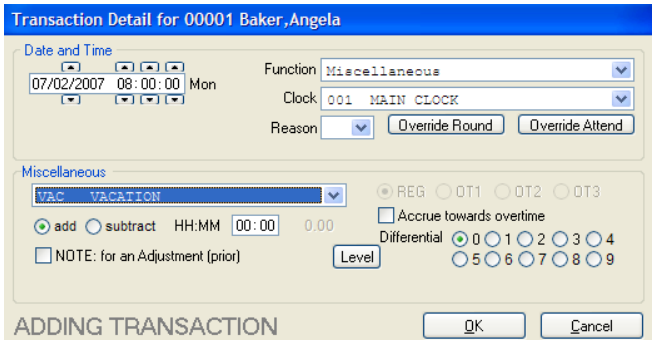


Figure 228: Transaction Detail

4. The *Transaction Detail* dialog box contains the following information:

Setting	Definition
Date	Enter0 the date for this transaction.
Time	Enter the time for the transaction. HH:MM:SS. Enter this in military time.
Function	Select Miscellaneous for this transaction. The Miscellaneous function is used for entering absences, vacation, tips and other categories of time and dollars.
Clock	Select the clock to which the transaction should be attributed.
Reason	Select the reason code associated with this transaction.
Override Rounding	Check this option to have Genesis Pro ignore the rounding rules for this transaction.
Override Attendance	Check this option to have Genesis Pro ignore the Attendance flags for this transaction.
Override Automatic Lunches and Breaks	Check this option to cancel all automatic lunches and breaks assigned to a specific day. The edit must be initiated from the start time.
Miscellaneous Information	This section will only become available when the Miscellaneous function is selected.
Category	Select the category for this transaction.
Add/Subtract	Select **Add** to add the number of hours or dollars in the next field. Select **Subtract** to deduct the number of hours or dollars in the next field.
HH:MM	If an ***Hours*** category was selected, this field will become available. Enter the number of hours for this transaction in decimal format.

Setting	Definition
Amount	If a ***Dollars*** category was selected, this field will become available. Enter the amount of dollars for this transaction.
NOTE: for an adjustment prior	Check this box if you would like a note to appear in the Timecard to denote an adjustment. If checked, a date field will appear. Enter in the date where you would like to see the note. The entry will appear on the day you select in the clock field. The note will appear on the day you entered in for the adjustment prior date.
REG/OT1/OT2/OT3	Select the rate at which the Miscellaneous time should be paid.
Accrue towards Overtime	Check this box to cause the Miscellaneous entry to count toward overtime (daily and weekly).
Differential	Select the differential at which the Miscellaneous time should be paid.
Level	Check this option to have Genesis Pro override the Job Costing level(s).
Prompt	This section will become available if a function requiring additional input is selected (for example, Enter a Department).
Input	Enter the additional input (for example, the Department number).

5. Click **OK** to commit the changes and return to the *Online Timecard*.

Edit a Transaction

This section describes how to use the **Edit** button in the Transaction tab. You can edit transactions from either the *Online Timecard* or the *Transactions* tab of the *Configure Employee* dialog box. The Online Timecard provides two buttons: **Edit/Add Start** and **Edit/Add Stop**, which are described in the next two sections.

1. Navigate to the *Transactions* tab of the *Configure Employee* dialog box and select the employee whose time you wish to edit. See ***Employee Transactions***, page 220.
2. Navigate to and select the transaction you wish to edit.
3. Click the **Edit** button. The *Transaction Detail* dialog box will open.

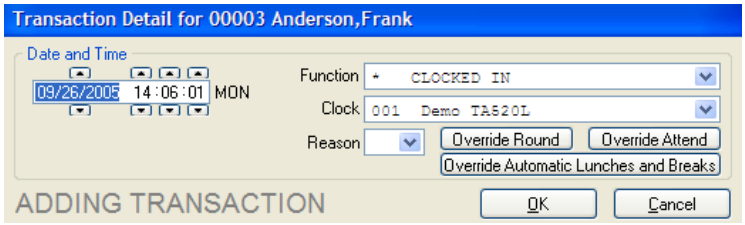


Figure 229: Edit Transaction

4. Fill in the settings as described in the *Add Transaction* section.
5. Click **OK** to commit the changes and return to the *Transactions* screen.

Edit/Add Start

Edit/Add Start is available from the *Online Timecard*. The **Edit/Add Start** button opens the *Transaction Detail* dialog box and automatically fills in certain fields.

- The **Date** fills in with the date selected in the Timecard.
- The **Time** fills in with the employee's scheduled Clock In time for the selected date.
- The **Function** fills in with Clocked In.

This option is easiest when you are adding a Clock In for the day that matches or is close to the employee's scheduled In time.

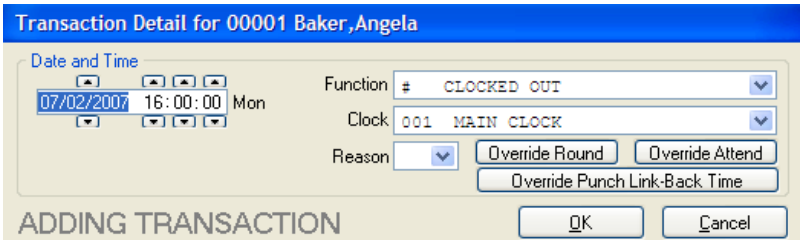
1. Navigate to the *Online Timecard* for the employee you wish to edit. See **Online Timecard**, page 251.
2. Click the **Edit/Add Start** button. The *Transaction Detail* dialog box will open.
3. Fill in the settings as described in the *Add Transaction* section.
4. Click **OK** to commit the changes and return to the *Online Timecard*.

Edit/Add Stop

Edit/Add Stop is available from the *Online Timecard*. The **Edit/Add Stop** button opens the *Transaction Detail* dialog box and automatically fills in certain fields.

- The **Date** fills in with the date selected in the Timecard.
- The **Time** fills in with the employee's scheduled Clock Out time for the selected date.
- The **Function** fills in with Clocked Out.
- The **Override Punch Link-Back Time** is now an override feature, this option will ignore all punch link-back time associated with a policy. This edit must be initiated from the stop time.

This option is easiest when you are adding a Clock Out for the day that matches or is close to the employee's scheduled Out time.



1. Navigate to the *Online Timecard* for the employee you wish to edit. See **Online Timecard**, page 251.
2. Click the **Edit/Add Stop** button. The *Transaction Detail* dialog box will open.
3. Fill in the settings as described in the *Add Transaction* section.
4. Click **OK** to commit the changes and return to the *Online Timecard*.

Multiple Miscellaneous

The Multiple Miscellaneous button appears in the Online Time Card and allows you to add Miscellaneous transactions on multiple days. This option is easiest when you are adding several days of the same category, for example, for a weeklong vacation or per-diems for a business trip.

1. Navigate to the *Online Timecard* for the employee you wish to edit. See **Online Timecard**, page 251.
2. Click the **Multiple Misc**. button. The *Multiple Miscellaneous Transaction* dialog box will open.

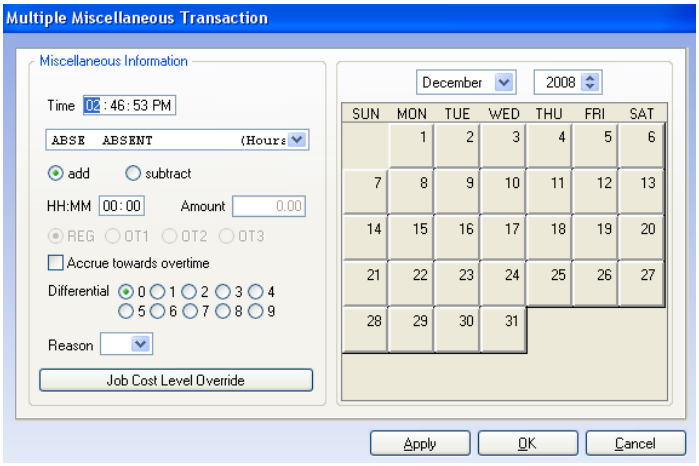


Figure 230: Multiple Miscellaneous

3. Fill in the settings as appropriate:

Setting	Definition
Time	Enter the start time for this miscellaneous transaction. If AM/PM activated from Main Company will require selection.
Category	Select the category for this transaction.
Add/Subtract	Select **Add** to add the number of hours or dollars in the next field. Select **Subtract** to deduct the number of hours or dollars in the next field.
HH:MM	If an ***Hours*** category was selected, this field will become available. Enter the number of hours for this transaction in decimal format.
Amount	If a ***Dollars*** category was selected, this field will become available. Enter the amount of dollars for this transaction. If an ***Hours*** category was selected, this field will automatically fill in when enter the HH:MM in the previous field.
REG/OT1/OT2/OT3	Select the rate at which the Miscellaneous time should be paid.
Accrue towards Overtime	Check this box to cause the Miscellaneous entry to count toward overtime (daily and weekly).
Differential	Select the differential at which the Miscellaneous time should be paid.
Reason	Select the reason code associated with this transaction.
Job Cost Level Override	Check this option to have Genesis SQL override the Job Costing level(s).
Calendar	Using the drop-down boxes at the top of the dialog box, select the Month and Year that contains the days for which you wish to add the Miscellaneous transactions. Click the dates on the calendar for which you wish to add the transactions. The dates selected will appear to be indented.

4. Click the **Apply** button. The Category code will appear on the days selected.

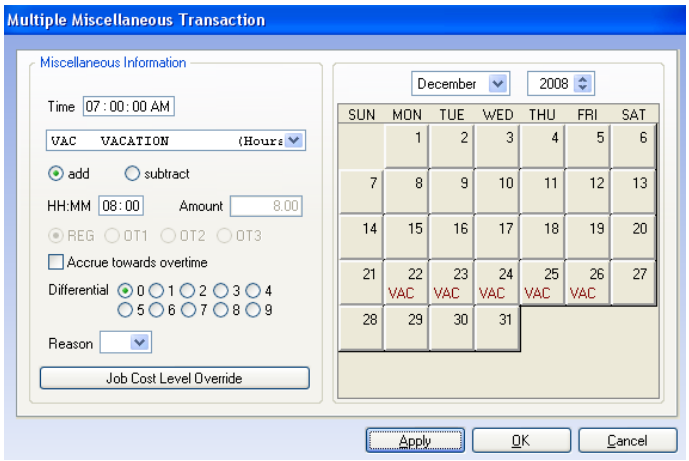


Figure 231: Multiple Miscellaneous

5. Click **OK** to commit the changes and return to the *Online Timecard*.

From Schedule

From Schedule adds a Clock In for the day and a Clock Out for the day punch, taking the times from the employee's schedule. This is useful when the employee did not punch in or out for the day, but worked the scheduled times.

TIP: You can check the **Show Schedule** option at the bottom of the Online Timecard in order to verify the scheduled Start and Stop times prior to using this feature.

1. Navigate to the *Online Timecard* for the employee you wish to edit. See **Online Timecard**, page 251.
2. Click the **From Schedule** button. Genesis Pro will automatically fill in the ***Start*** and ***Stop*** fields with the employee's ***Scheduled Start*** and ***Stop*** times for the day.

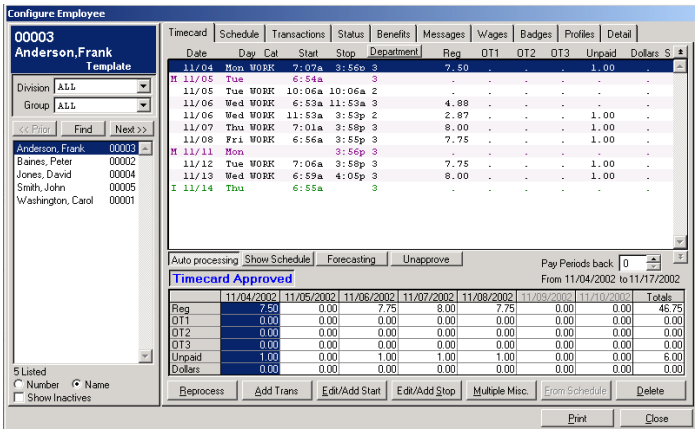


Figure 232: Start and Stop filled in From Schedule

Delete a Transaction

You may need to delete a transaction that has been made in error. Delete carefully, as there is no way to retrieve deleted data.

1. Navigate to the *Online Timecard* (see **Online Timecard**, page 251) or the *Transactions* tab of the *Configure Employee* dialog box (see ***Employee Transactions***, page 220) and select the employee you wish to edit.
2. Navigate to the transaction you wish to delete.
3. Click the **Delete** button. You will be prompted with one of the following, depending upon what you are deleting:

This dialog box will appear if you are deleting a line in the Timecard that has both a Start and a Stop.

This dialog box will appear if you are deleting a single Start or Stop, from either the Timecard or the Transactions.

Audit Trails

Genesis Pro keeps track of the changes that are made to time entries. This feature is known as an "Audit Trail." The Transactions tab of the Configure Employee dialog box displays the changes made to a transaction, the date the change was made, and the name and number of the person who made the change. This information can be printed for reporting purposes.

1. Navigate to the *Transactions* tab of the *Configure Employee* window and select the employee you wish to view.
2. Highlight the transaction for which you wish to see the Audit Trail.
3. The Audit Trail section of the screen contains the following:

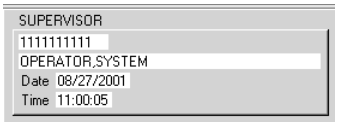


Figure 233: Audit Trail

Setting	Definition
Supervisor	Displays the name and number of the supervisor who edited this transaction.

Supervisor Badge	Displays the badge number associated with the Supervisor who made the edit.
Date	Displays the Date on which the edit was made.
Time	Displays the Time at which the edit was made.

Print the Audit Trails

Genesis Pro tracks all changes that are made to time entries. You may print this Audit Trail history.

1. Navigate to the *Transactions* tab of the *Configure Employee* window and select the employee you wish to view.
2. Highlight the transaction for which you wish to see the Audit Trail.
3. Click the **Print** button. A drop-down list of Reports associated with this screen will appear.

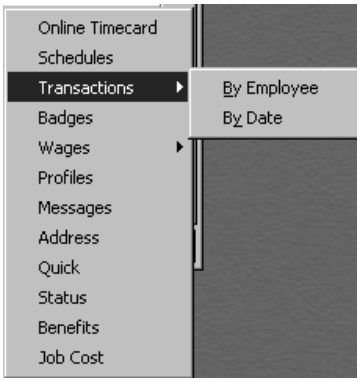


Figure 234: Printing Audit Trails

4. Select **Transactions, By Employee** or **By Date**. The *Print Transaction Listing* dialog box will open.

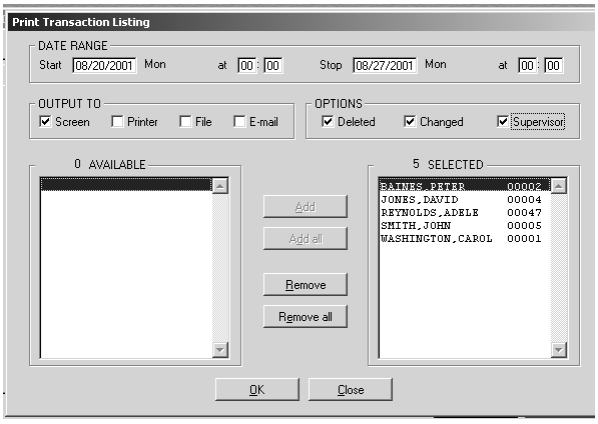


Figure 235: Print Transaction Listing

5. Fill in the settings as appropriate:

Setting	Definition
Start	Enter the starting date for the report.
At	Enter the starting time for the report.
Stop	Enter the ending date for the report.
At	Enter the ending time for the report
Output to	Select the type of report output you wish. **Screen**: The report will preview on screen. You are then able to print from the preview. **Printer**: The report will be sent directly to the printer. **File**: The report will be sent to a FoxPro report file. **Email**: The report will be sent via email. (See ***Emailing a Report***, page 297).
Options	Select which Audit Trail items you wish to print along with the Transaction details. **Deleted**: The report will display deleted entries. **Changed**: The report will display the editing history of the transaction. **Supervisor**: The report will display transactions edited by supervisors at the clock.
Employees	Select which employees for whom you wish to print Transactions. **Add**: Adds the selected employee to the list of employees for the report. **Add All**: Adds all employees to the list of employees for the report. **Remove**: Removes the selected employee from the list of employees for the report. **Remove All**: Removes all employees from the list of employees for the report.

6. Click **OK** to commit the changes and run the report.
7. After previewing and/or printing, close the report (if necessary).

   NOTE: The transaction report is color coded with red representing deleted items and blue representing changes,
8. Click the **Close** button to exit the *Report Settings* dialog box and return to the *Transactions* screen.

Approval Editor

The Approval Editor is an extremely useful tool that displays employee transactions that need approval or editing by a supervisor. These items display in the Approval Editor by default:

- System-Generated Absences
- Missing Punches

You can choose to have attendance infractions appear in the Approval Editor as well. See ***Configure Attendance Codes***, page 45. Some examples of additional items you may wish to have display are:

- In Late
- Out Early
- Long or Short Lunches or Breaks

It is also possible to edit transactions directly from the Approval Editor. Double-clicking a transaction from the Approval Editor opens the Online Timecard, from which you can add, edit and delete transactions normally. (See ***Approval Editor***, page 266).

1. Click the **Edit** menu**, Approval Editor,** or by clicking on the . The *Approval Editor* screen will open.

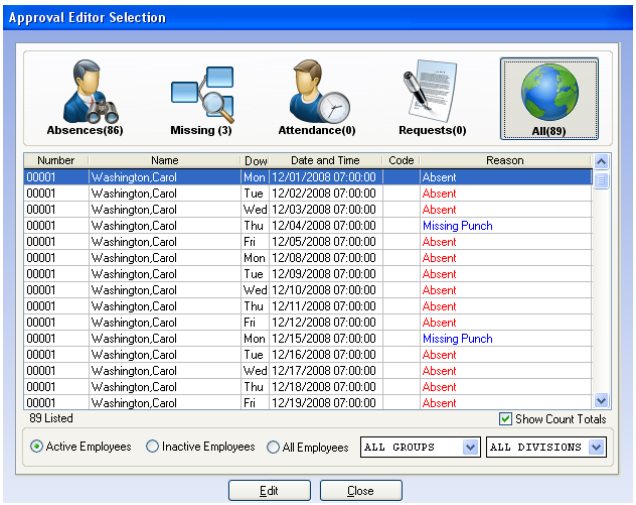


Figure 236: Approval Editor

2. The *Approval Editor* contains the following information:

Setting	Definition
Absences	Select this option to show only Absent Exceptions needing approval.
Missing	Select this option to show only Missing Punch Exceptions needing approval.
Attendance	Select this option to show only Attendance Infractions needing approval (such as In Late or Out Early).
Requests	Select this option to show only pending Leave Request.
All	Select this option to show all Absences, Missing Punches, Attendance Infractions, Leave Requests and all other Exceptions.

Name	Displays the employee's name.
Number	Displays the employee's number.
Dow	Displays the day of the week on which the item needing approval occurred.
Date	Displays the date on which the item needing approval occurred.
Time	Displays the time at which the item needing approval occurred.
Code	Displays the Attendance Code for any infractions. (i.e., IL for In Late, OG for Out Graced, etc.).
Reason	Displays the reason in color why the transaction is displayed in the Approval Editor
Show Count Totals	Displays the number of infractions next to the label.
Active	Select this option to show only Active employees.
Inactive	Select this option to show only Inactive employees.
All Employees	Select this option to show both Active and Inactive employees.
Group	Select this option to display a specific Group.
Division	Select this option to display a specific Division.

3. To edit a transaction from the *Approval Editor*, double-click the transaction you wish to change.

   The *Online Timecard* will open to display the pay period during which the transaction took place.

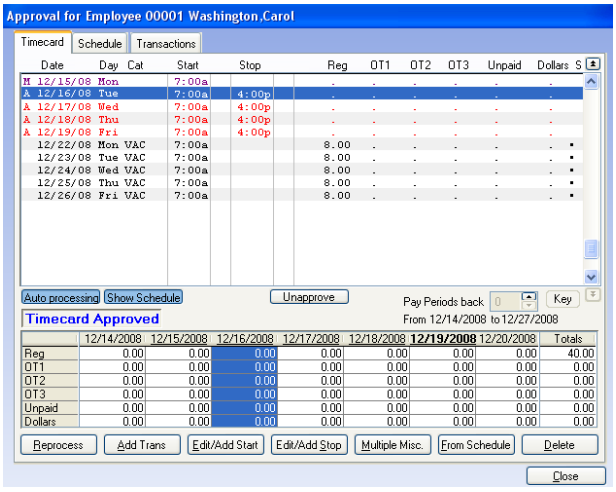


Figure 237: Online Timecard (from Approval Editor)

4. Add, edit or delete the transaction as needed. For more information on these tasks, see ***Adding*** and ***Editing Transactions***, page 253, and ***Deleting a Transaction***, page 263.

The Schedules Tab and Transaction tab will also be available to view and edit. See Employee Schedule Tab, page 211 and the Employee Transactions Tab, page 220.

Status Board

The *Status Board* screen is a useful tool that displays the Status Board for recorded for each employee within a certain time range (for example, in the last 18 hours). This is an excellent way to find out the current whereabouts of your employees. The data displayed in the screen is for information purposes only and cannot be edited.

NOTE: If an employee has not punched within the time range specified no data will appear next to his or her name.

1. Click the **Edit** menu**, Status Board**. The *Status Board* screen will open. You may select a specific type of status to view or select All to display each status available.

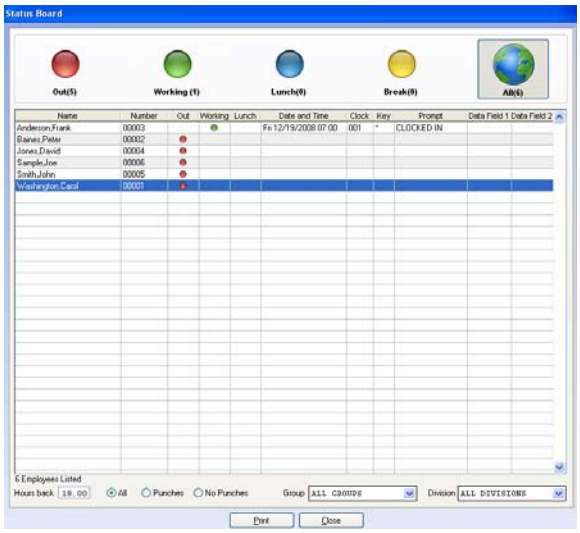


Figure 238: Status Board

2. The *Status Board* screen contains the following information:

Setting	Definition
Number	Displays the number of the employee.
Name	Displays the name of the employee.
Status	The different color squares indicate the current status of the employee. NOTE: The status is only as accurate as the last time it polled the clocks.
Date & Time	Displays the day and time of the last punch recorded.
Clock	Displays the clock at which the punch occurred.
Key	Displays the function key on the clock pressed.
Prompt	Displays the prompt associated with the function key pressed.

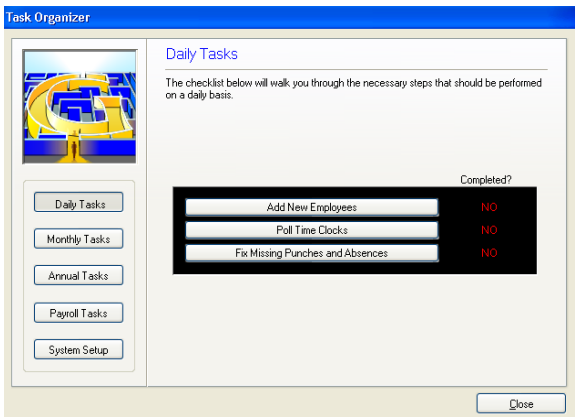
Setting	Definition
Data Field 1	Displays the code for any data that the employee was prompted to enter. For example, **PRD1** for per diem, **TIP1** For tips, etc.
Data Field 2	Displays the code for any data that the employee was prompted to enter. For example, **PRD1** for per diem, **TIP1** For tips, etc.
Hours Back	Enter the number of hours in the past you wish Genesis Pro to look for the last punch. The default is 18 hours, indicating that the Status Board screen will show all transactions that have occurred in the last 18 hours.
All	Select this option to display all employees, regardless of whether they have punched within the Hours Back time range.
Punches	Select this option to display only employees who have punched within the Hours Back time range.
No Punches	Select this option to display only employees who have not punched within the Hours Back time range.
Group	Select a Group to only view employees assigned to that Group.
Division	Select a Division to only view employees assigned to that Division.
Print button	Print the Status Board report.

3. Click **Close** to exit the *Status Board* window.

Task Organizer

The Task Organizer is an extremely useful tool that allows the user to walk through the necessary steps that should be performed for a specific period of time, such as *Daily, Monthly, Annual, Payroll and System Setup.*

1. Click the **Edit** menu**, Task Organizer**. The *Task Organizer* screen will open.



2. The *Task Organizer* screen contains the following links:
    - Daily
    - Monthly
    - Annual
    - Payroll
    - System Setup

Chapter IX Global Commands

This section describes commands and tasks that can be performed for many employees at once. These tasks include Global Message Assignment, Schedule Assignment and Changes, Profile Assignment and Transaction additions.

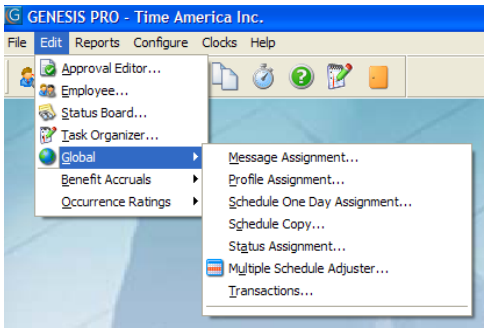


Figure 239: Global Menu

Selecting Employees in Global Operation Dialog Boxes

The method of selecting employees is the same in nearly all of the Global Operation (as well as the Report Parameter) dialog boxes. For ease of use, the technique is described here and referenced in the instructions below.

There are four ways to select employees: Individually, Globally, by Group, and by Division.

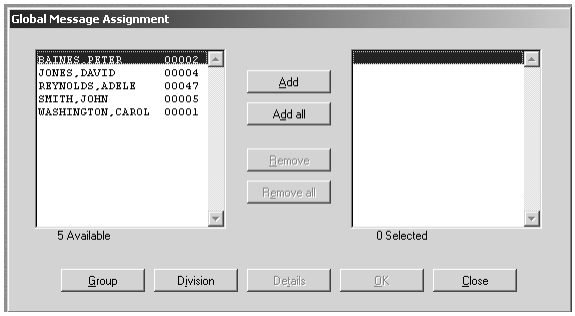


Figure 240: Selecting Employees

Select Employees Individually

1. Select the Employee you wish to choose.
2. Click the **Add** button. The employee will appear in the ***Selected*** list on the right.

Select Employees Globally

1. Click the **Add All** button. All employees will appear in the ***Selected*** list on the right.

Select Employees by Group

1. Click the **Group** button. The *Group Selection* dialog box will open.

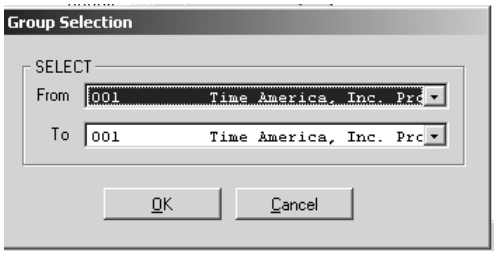


Figure 241: Group Selection

2. Use the drop-down to select in the **From** box to select the first Group you wish to choose.
3. Use the drop-down to select in the **To** box to select the first Group you wish to choose. (**TIP**: To choose a single group, select the same Group in both boxes).
4. Click **OK** to accept the changes and return to the dialog box. All employees in the selected Groups will appear in the ***Selected*** list on the right.

Select Employees by Division

1. Click the **Division** button. The *Division Selection* dialog box will open.

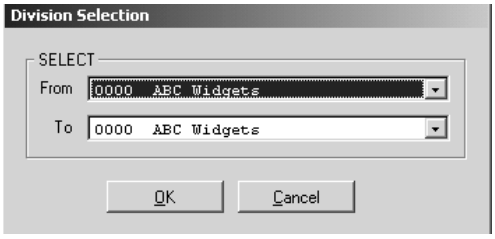


Figure 242: Division Selection

2. Use the drop-down to select in the **From** box to select the first Division you wish to choose.
3. Use the drop-down to select in the **To** box to select the first Division you wish to choose. (**TIP**: To choose a single Division, select the same Division in both boxes).
4. Click **OK** to accept the changes and return to the dialog box. All employees in the selected Division will appear in the ***Selected*** list on the right.

Global Message Assignment

Global Message Assignment allows you to create a customized message that will display when employees punch at the clock. This is an easy way to send the same message to multiple employees at once. For example, you might send a message that says "Welcome" or display the employee's name after punching.

1. Click the **Edit** menu**, Global, Message Assignment**. The *Global Message Assignment* dialog box will open.

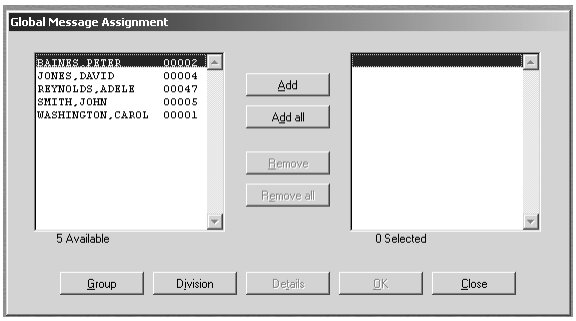


Figure 243: Global Message Assignment

2. Select the employee(s) to whom you wish to send the message using the techniques described above (see ***Selecting Employees in Global Operation Dialog Boxes***, page 272).
3. Click the **Details** button. The *Global Message Assignment Details* dialog box will open.

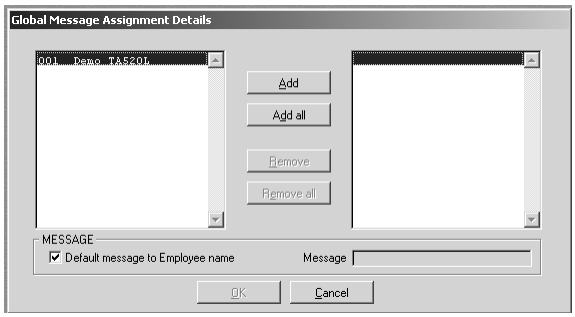


Figure 244: Global Message Assignment Details

4. Select the clock(s) to which the message should be sent by click **Add** to select a single clock, or **Add All** to select all clocks.
5. Check ***Default message to Employee name*** or enter the ***Message*** you wish to send. The Message can be up to 20 characters long (this is the maximum number of characters that can display on the LCD panel of the clock).
6. Click **OK** to commit the changes and return to the *Global Message Assignment* dialog box.
7. Click **OK** to send the message. The message will display to employees after it is uploaded to the clock.
8. Click **Close** to exit the dialog box.

Global Profile Assignment

Global Profile Assignment is used to assign Profile Lockouts and clock access to multiple employees. The Profile Lockout is first assigned to the clock, and the clock is then assigned to the employees. This makes the clock's profile available to the employees. You are then able to choose which Profile Schedules apply for each day of the week.

1. Click the **Edit** menu**, Global, Profile Assignment**. The *Global Profile Assignment* dialog box will open.

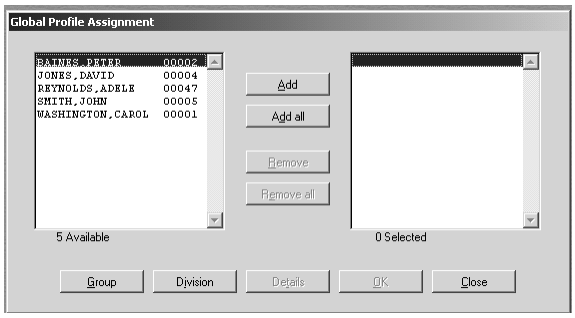


Figure 245: Global Profile Assignment

2. Select the employee(s) you wish to assign using the techniques described above (see ***Selecting Employees in Global Operation Dialog Boxes***, page 272).
3. Click the **Details** button. The *Global Profile Assignment Details* dialog box will open.

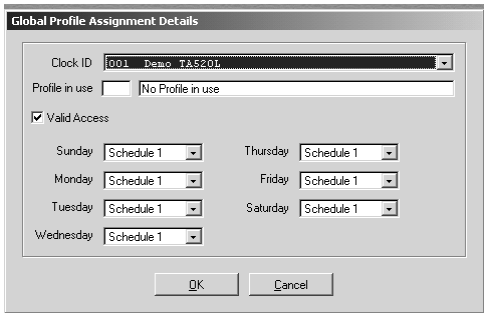


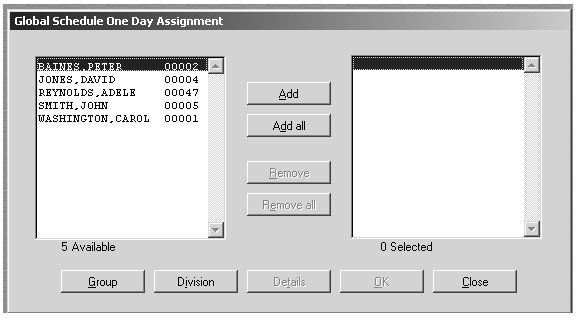
Figure 246: Global Profile Assignment Details

4. Fill in the settings as described in the ***Employee Profiles*** section, page 240.
5. Click **OK** to commit the changes and return to the *Global Profile Assignment* dialog box.
6. Click **OK** again to complete the assignment.
7. Click **Close** to exit the dialog box.

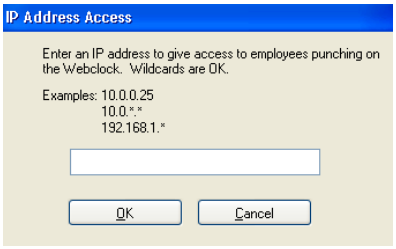
Global IP Access

Global IP Access is used to assign IP Addresses to employees punching on the Webclock. Wildcards are okay.

1. Click the **Edit** menu**, Global, IP Access**. The *Global IP Access Assignment* dialog box will open.



2. Select the employee(s) you wish to assign using the techniques described above (see ***Selecting Employees in Global Operation Dialog Boxes***, page 272).
3. Click the **Details** button. The *Global IP Access Details* dialog box will open.



4. Fill in the appropriate IP Address, wildcards are okay.

Global Schedule One Day Assignment

The Global Schedule One Day Assignment is used to assign multiple employees to the same Shift, Department, Job, Step, Operation, and Task (if applicable) for one day. This can be useful if you need an entire Group to come in on Saturday or work a special shift for a project, etc.

1. Click the **Edit** menu**, Global, Schedule One-Day Assignment**. The *Global Schedule One Day Assignment* dialog box will open.

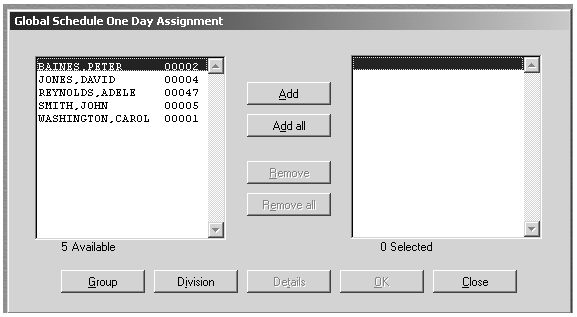


Figure 247: Global Schedule One-Day Assignment

2. Select the employee(s) you wish to assign using the techniques described above (see ***Selecting Employees in Global Operation Dialog Boxes***, page 272).
3. Click the **Details** button. The *Global Schedule One Day Details* dialog box will open.

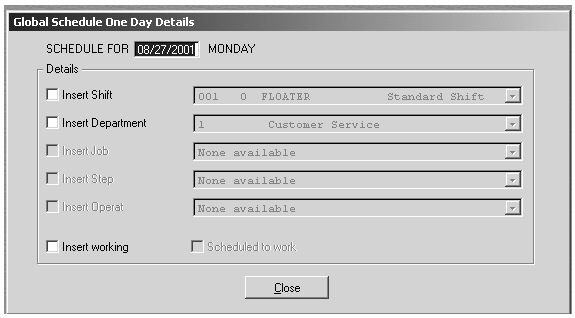


Figure 248: Global Schedule One-Day Details

4. Fill in the settings as appropriate:

Setting	Definition
Date	Enter the date on which this schedule assignment should take place.
Insert Shift	Select the pre-defined Shift to be assigned.
Insert Department	Select the Department in which the employees will work.
Insert Job	Select the Job on which the employees will work.
Insert Step	Select the Step on which the employees will work.
Insert Operation	Select the Operation on which the employees will work.
Insert Task	Select the Task on which the employees will work.
Insert Working	Check this box to indicate that the employees will work on the date selected.
Scheduled to Work	Check this box to indicate if the employees are scheduled to work.

5. Click the **Close** button to commit the changes and return to the *Global Schedule One Day Assignment* dialog box.
6. Click **OK** to complete the assignment.
7. Click **Close** to exit the dialog box.

Global Schedule Copy

Global Schedule Copy allows you to copy a pre-defined Schedule Template to multiple employees at once.

1. Click the **Edit** menu**, Global, Schedule Copy**. The *Global Schedule Copy* dialog box will open.

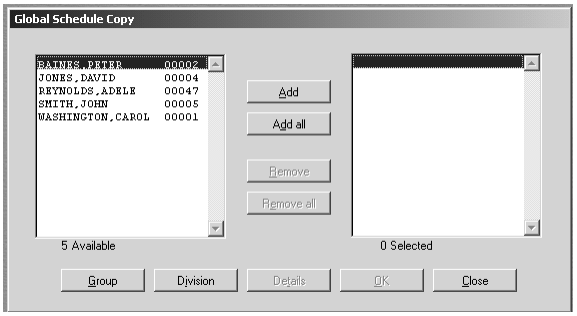


Figure 249: Global Schedule Copy

2. Select the employee(s) you wish to assign using the techniques described above (see ***Selecting Employees in Global Operation Dialog Boxes***, page 272).
3. Click the **Details** button. The *Global Schedule Copy Details* dialog box will open.

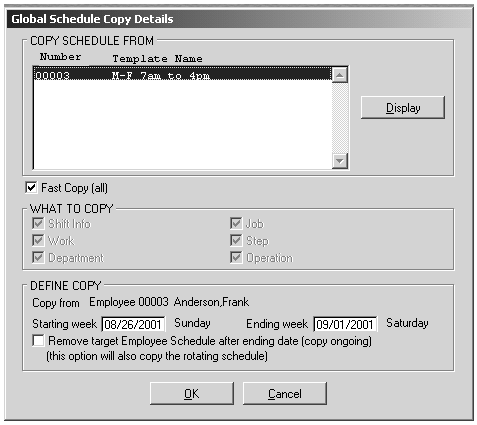


Figure 250: Global Schedule Copy Details

4. Fill in the settings as appropriate:

Setting	Definition
Number	Displays the number of the pre-defined Schedule Template(s) available.
Template Name	Displays the name of the pre-defined Schedule Template(s) available.
Display Button	Click this button to view the details of the selected Template.
Fast Copy (all)	Check this box to copy all available Schedule elements.
What to Copy	These settings allow choosing which Schedule elements will be copied, and will only be available if Fast Copy is unchecked.
Shift Info	Check this box to copy Shift Info (daily Start and Stop times)
Work	Check this box to copy which days are expected to be worked.
Department	Check this box to copy Department assignments.
Job	Check this box to copy Job assignments.
Step	Check this box to copy Step assignments.
Operation	Check this box to copy Operation assignments.
Task	Check this box to copy Task assignments.

Setting	Definition
Define Copy	These settings determine the date range to be copied to.
Starting Week	Enter the day you wish the copied schedule to start.
Ending Week	Enter the day you wish the copied schedule to end.
Copy Ongoing	Check this option to cause Genesis Pro to automatically copy the template on an ongoing into the future.

5. Click the **OK** button to commit the changes and return to the *Global Schedule Copy* dialog box.
6. Click **OK** again to complete the assignment.
7. Click **Close** to exit the dialog box.

Global Status Assignment

Global Status Assignment allows you to assign multiple employees to a status area, such as ***Status, Work Week, Work Type*** and ***Policy***.

1. Click the **Edit** menu**, Global, Status Assignment**. The *Global Status Assignment* dialog box will open.

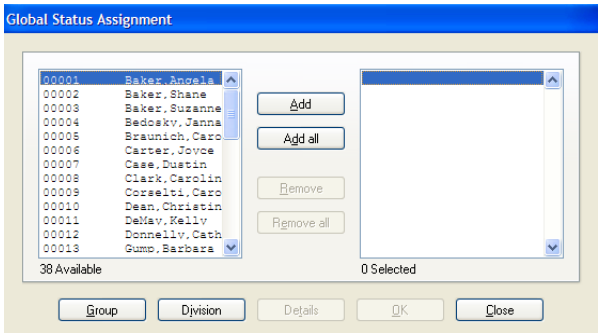


Figure 251: Global Status Assignment

2. Select the employee(s) you wish to assign using the techniques described above (see ***Selecting Employees in Global Operation Dialog Boxes***, page 272).
3. Click the **Details** button. The *Global Status Assignment Details* dialog box will open.

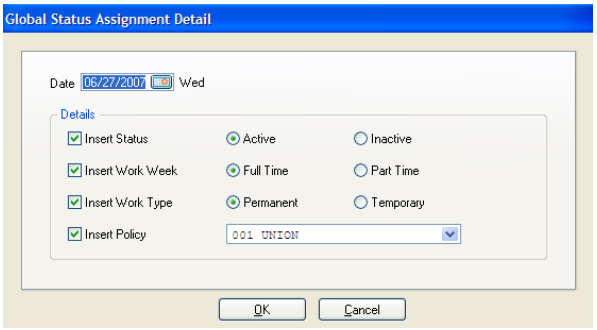


Figure 252: Global Status Assignment Details

4. Fill in the settings as appropriate:

Setting	Definition
Date	Enter the date that this **Status** change becomes effective.
Insert Status	Choose whether the employees are Active or Inactive as of the selected date. **Active** indicates that the employees are currently working for the company. **Inactive** indicates that the employees are not currently working for the company, perhaps because of a leave of absence or termination.
Insert Work Week	Choose whether the employees are **Full Time** or **Part Time** as of the selected date.
Insert Work Type	Choose whether the employees are **Permanent** or **Temporary** as of the selected date.
Insert Policy	Select the **Policy** that will apply to all employees as of the effective date.

5. Click the **OK** button to commit the changes and return to the *Global Status Assignment* dialog box.
6. Click **OK** again to complete the assignment.
7. Click **Close** to exit the dialog box.

Multiple Schedule Adjuster

The Multiple Schedule Adjuster allows you to adjust the schedule for more than one employee from one screen. You will still adjust each person's schedule individually, but you will not need to change screens to move from employee to employee.

1. Click the **Edit** menu**, Global, Multiple Schedule Adjuster**. The *Multiple Schedule Adjuster* dialog box will open.

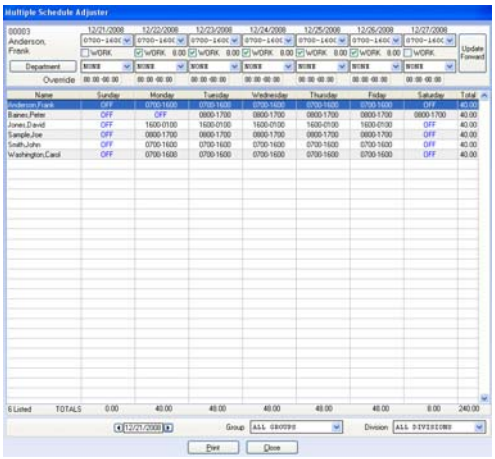
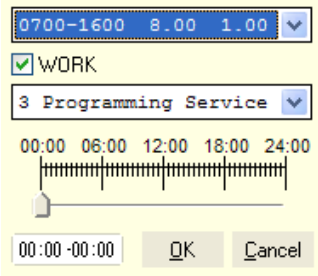


Figure 253: Multiple Schedule Adjuster

2. Select the employee whose schedule you wish to edit.
3. Fill in the settings as appropriate:



NOTE: A popup window is available to edit shifts and perform shift overrides. The popup window can be accessed by double clicking in the shift field.

Setting	Definition
Date	Indicates the date to be edited. These fill in automatically based on the week selected at the bottom of the dialog box.
Shift Selector	Select the Shift assigned to each day of the week.
Work Box	Check this box to indicate whether or not the employee is scheduled to work that day and it will display how many paid hours are forecasted.
Level button	Defaults to Department. Clicking the button will change the purpose of the Level Input box. The first time you click the button, it will change to Job, then to Step, then to Operation, then to Task, then back to Department.
	Select the Level for which you wish to enter input.
Level Input box	Select the Department, Job, Step, Operation, or Task assigned for each day. The values available will depend upon the Level shown on the Level button to the left.
Override	Enter the start and stop schedule change time for rounding rule purposes only.

Update Forward	Click this button if you wish to apply the schedule changes into the future.
Schedule Display	Displays a list of employees and their currently assigned schedule for the week.
Listed	Displays the number of employees included in the Multiple Schedule Adjuster.
Total Scheduled	Gives the total number of hours that each employee is scheduled to work.
Totals	Gives the total number of hours by day and by week that all the employees are scheduled to work.
Week	Allows you to select the week for which you wish to adjust the schedule.
Group	Allows you to filter the employee list by Group. Select the Group you wish to view.
Division	Allows you to filter the employee list by Division. Select the division you wish to view.

4. Repeat steps 2 through 3 for each employee you wish to change.
5. Click Print to view a report defined by Department, Job or Step.
6. Click **Close** to exit the *Multiple Schedule Adjuster* dialog box.

Global Add Transaction

Global Add Transaction allows you to add a transaction of any type for multiple employees. This can be used to clock all employees out at a certain time, enter vacation or sick time for multiple employees, etc.

1. Click the **Edit** menu**, Global, Transactions**. The *Global Add Transaction* dialog box will open.

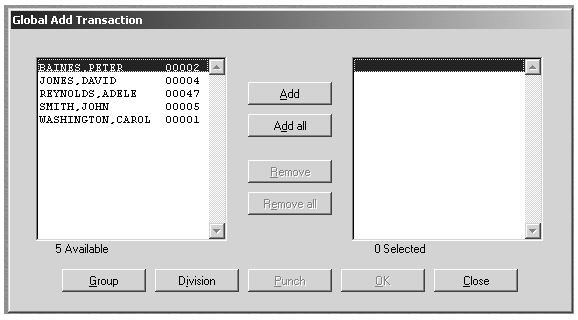


Figure 254: Global Add Transaction

2. Select the employee(s) you wish to assign using the techniques described above (see ***Selecting Employees in Global Operation Dialog Boxes***, page 272).

3. Click the **Punch** button. The *Global Add Transaction Details* dialog box will open.

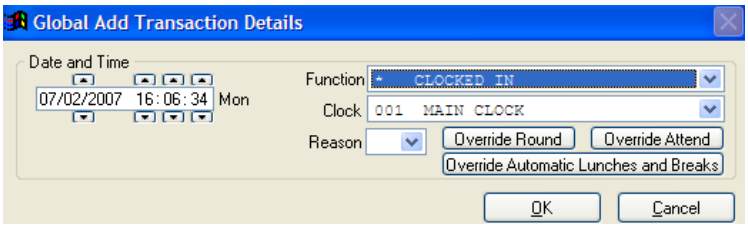


Figure 255: Global Add Transaction Details

4. Fill in the settings as described in the ***Adding and Editing Transactions*** section, page 253.
5. Click the **OK** button to commit the changes and return to the *Global Add Transaction* dialog box.
6. Click **OK** again to complete the entry.
7. Click **Close** to exit the dialog box.

Chapter X Reports

Genesis Pro has more than 300 available reports. In the interest of brevity, this section will focus on the concepts and techniques associated with running reports and listings rather than on the specifics of running every one of the reports.

Listings are a type of report that "lists" the items and settings in your Genesis Pro database. Listings are good to print for reference information. Examples are listings of Departments, Policies, Rounding rules, Clocks, etc.

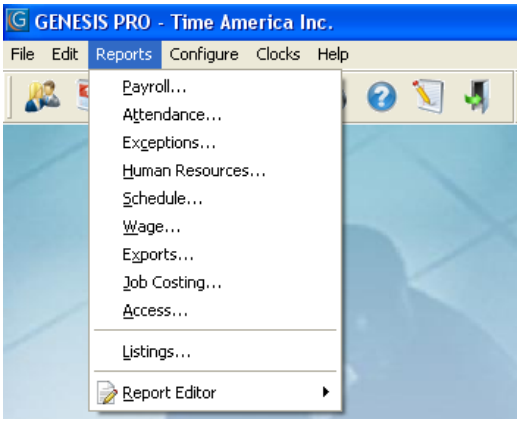


Figure 256: Reports Menu

Important Information on Printing Reports

Genesis Pro prints reports to the printer that is currently defined for the program under File, Print. By default, this is the same as the Windows default printer. If you wish to choose a different printer, you must make the change *prior to* running the report, as the Report Print command sends the report directly to the printer without prompting you to choose a printer.

The following instructions describe how to change your Genesis Pro printer.

Configure Printer

1. Click the **File** menu**, Print**. The *Print Setup* dialog box will open.

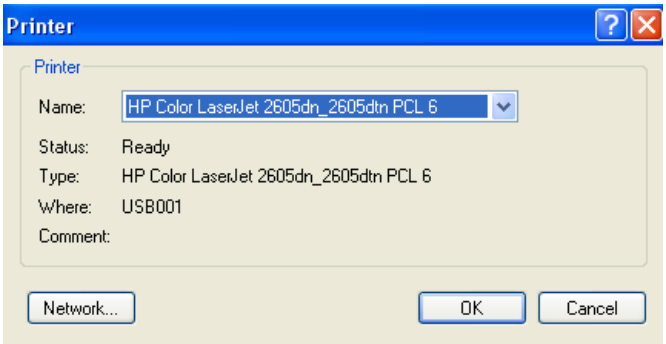


Figure 257: Print Setup

2. Using the **Name** drop-down box, select the pre-defined printer to which you wish to print.

3. Click **OK** to commit the changes and exit the dialog box. The Genesis Pro printer will be changed and reports will now print to it.

Running a Report

The basics of running reports are the same from report to report. Some reports may prompt for additional information that is particular to that specific report, but most have standard settings.

The Reports are organized into categories to make them easier to find. The categories are:

- **Payroll**: Hours Paid, Timesheet, and other Payroll oriented reports.
- **Attendance**: Who's In, Who's Not In and other Attendance oriented reports.
- **Exceptions**: Absences, Missing Punches, and other Exception oriented reports
- **Human Resources**: Benefits, Seniority and other Human Resources reports.
- **Schedule**: Who's Scheduled, Coverage and other Schedule reports.
- **Wage**: Employee, Division, Group Wages and other Pay oriented reports
- **Exports**: Payroll exports
- **Job Costing**: Labor Distribution, Piece Wage and other Job oriented reports
- **Access**: Who was Granted Access and other building access reports.
- **Listings**: Lists and setup definitions for your Genesis Pro configuration.

Most reports can be run by Range (allowing you to select a range of items or employees) or Individual (allowing you to selecting individual employees or groups of employees). Both methods are described below.

Running a Report by Range

1. Click the **Reports** button to display the report categories.
2. Select the category in which you wish to search. The *Select Report* list for that category will appear.

   NOTE: The Location feature allows you to move a report from one report category to another.

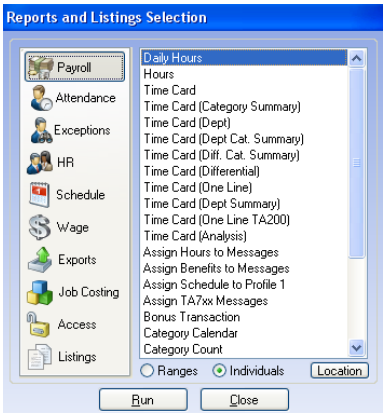


Figure 258: Example: Select Report dialog box

3. Select the report you wish to run.

4. Select the ***Ranges*** option.
5. Click the **Run** button. The *Report Parameter Selection* dialog box will open.

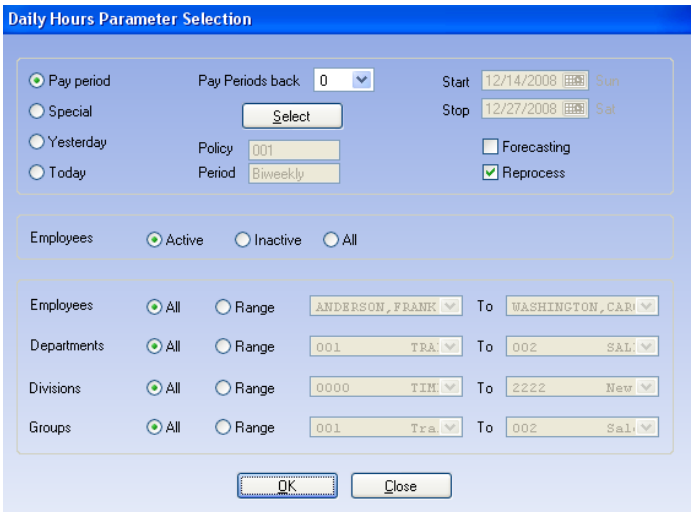


Figure 259: Report Parameter Selection

6. Fill in the settings as appropriate:

Setting	Definition
Pay Period	Select this option to run the report for a pay period. You will need to fill in the rest of the pay period options that become available when the option is selected. **Policy**: Select the policy that contains the pay period definition you wish to use. **Pay Periods Back**: Enter the number of pay periods in the past for which to run the report Verify the dates shown in the Start and Stop fields. **TIP**: Entering **0** will run the report for the current pay period.
Pay Periods Back	Enter the number of pay periods in the past for which to run the report Verify the dates shown in the Start and Stop fields. **TIP**: Entering **0** will run the report for the current pay period.
Select	Click this button to select the Policy that contains the pay period definition you wish to use.
Policy	Displays the number of the selected Policy
Period	Displays the pay period frequency (weekly, biweekly, etc.).
Special	Select this option to enter the date range manually.

Setting	Definition
Start	The purpose of this field changes depending upon which Date Range option has been chosen. If **Special** is chosen, enter the first date you wish to display on the report. If **Pay Period** is chosen, this field will display the first date of the selected pay period. If **Yesterday** or **Today** are chosen, this field will display Yesterday or Today's date.
Stop	The purpose of this field changes depending upon which ***Date Range*** option has been chosen. If **Special** is chosen, enter the last date you wish to display on the report. If **Pay Period** is chosen, this field will display the last date of the selected pay period. If **Yesterday** or **Today** are chosen, this field will display Yesterday or Today's date.
Yesterday	Select this option to choose yesterday's date.
Today	Select this option to choose today's date.
Forecasting	Check this box to include hours forecasted from schedule (not worked yet) on the reports.
Reprocess	Check this box to reprocess punch information prior to running the report. **NOTE**: This significantly slows down the running of the report and is unnecessary if you already have AutoProcessing turned on.
Employees	Select which type of employees you wish to be included on the report. **Active**: The report will print only Active employees. **Inactive**: The report will print only Inactive employees. **Both**: The report will print both Active and Inactive employees.
All	Check **All** to indicate that you wish all items in a collection to be printed.
Range	Check **Range** to indicate that you wish to choose a range of items.

Setting	Definition
Employees	Select the employees for whom you wish to print the report. If you have chosen **Range**, select the starting and ending employees. Genesis Pro will print all employees between the selected individuals (inclusive).
Departments	Select the Departments for which you wish to print the report. If you have chosen **Range**, select the starting and ending Departments. Genesis Pro will print employees in all Departments between the selected items (inclusive).
Divisions	Select the Divisions for which you wish to print the report. If you have chosen **Range**, select the starting and ending Division. Genesis Pro will print employees in all Divisions between the selected items (inclusive).
Groups	Select the Groups for which you wish to print the report. If you have chosen **Range**, select the starting and ending Groups. Genesis Pro will print employees in all Groups between the selected items (inclusive).

7. When all settings are complete, click **OK** to proceed to the *Additional Reporting Parameters* dialog box.

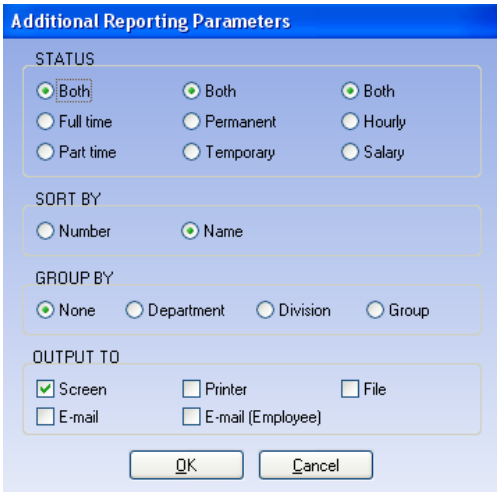


Figure 260: Additional Reporting Parameters

8. The *Additional Parameters* dialog allows you to further filter and group report data. Fill in the settings as appropriate:

Setting	Definition
Status	These settings allow you filter which employees' data will be printed.

Setting	Definition
Full Time/Part Time/Both	Check **Full Time** to print only employees whose Status is **Full Time**. Check **Part Time** to print only employees whose Status is **Part Time**. Check **Both** to print both Full Time and Part Time employees.
Permanent/Temporary/Both	Check **Permanent** to print only employees whose Status is **Permanent.** Check **Temporary** to print only employees whose Status is **Temporary.** Check **Both** to print both Permanent and Temporary employees.
Hourly/Salary	Check **Hourly** to print only employees whose Status is **Hourly.** Check **Salary** to print only employees whose Status is **Salary**. Check **Both** to print both Hourly and Salary employees.
Sort By	Select the setting by which you want employee records to sort. The options are **Number** (Employee ID Number) or **Name**.
Group By	Select the setting by which you want employee records to group (organize). The options are **None, Department, Division** and **Group**.
Output to	Select the media to which you wish to output the report. The options are: **Screen**: The report will preview on screen. You are then able to print from the preview. **Printer**: The report will be sent directly to the printer. **File**: The report will be sent to a FoxPro report file. **Email**: The report will be sent via email. If you choose this option, you will be given an additional screen to enter the email recipients. (See ***Emailing a Report***, page 297). **Email (Employee)**: The report will be sent via email. If you choose this option, you will be given an additional screen to select the employee. **NOTE:** Reports can only be Emailed via Microsoft Outlook.

9. When all settings are complete, click the **OK** button to run the report.

   NOTE: Some reports may prompt for additional information particular to the specific report at this point. You may also be prompted for Email recipient information, if you choose to send the report via email.

10. The report will output to your choice (Screen, Printer, File or Email.)
11. After receiving the report, click the **Close** button until you have exited all the dialog boxes.

Running a Report by Individual

1. Click **Reports** to display the report categories.
2. Select the category in which you wish to search. The *Select Report* list for that category will appear.

   NOTE: The Location feature allows you to move a report from one report category to another.

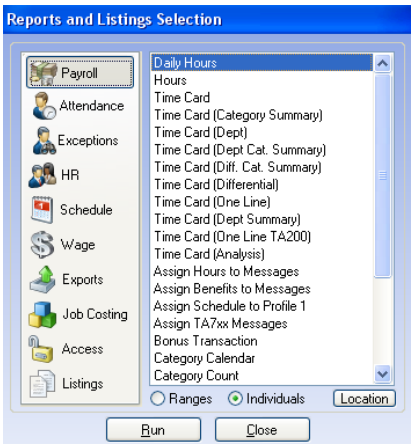


Figure 261: Example: Select Report dialog box

3. Highlight the report you wish to run.
4. Select the **Individuals** option.
5. Click the **Run** button. The *Report Parameter Selection* dialog box will open.

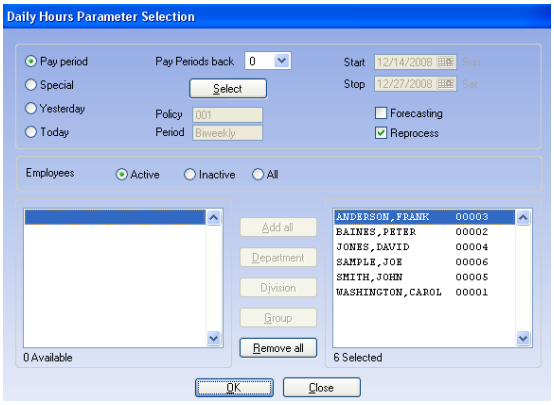


Figure 262: Report Parameter Selection

6. Fill in the settings as appropriate:

Setting	Definition
Pay Period	Select this option to run the report for a pay period. You will need to fill in the rest of the pay period options that become available when the option is selected. **Policy**: Select the policy that contains the pay period definition you wish to use. **Pay Periods Back**: Enter the number of pay periods in the past for which to run the report Verify the dates shown in the Start and Stop fields. **TIP**: Entering **0** will run the report for the current pay period.
Pay Periods Back	Enter the number of pay periods in the past for which to run the report Verify the dates shown in the Start and Stop fields. **TIP**: Entering **0** will run the report for the current pay period.
Select	Click this button to select the Policy that contains the pay period definition you wish to use.
Policy	Displays the number of the selected Policy
Period	Displays the pay period frequency (weekly, biweekly, etc.).
Special	Select this option to enter the date range manually.
Start	The purpose of this field changes depending upon which Date Range option has been chosen. If **Special** is chosen, enter the first date you wish to display on the report. If **Pay Period** is chosen, this field will display the first date of the selected pay period. If **Yesterday** or **Today** are chosen, this field will display Yesterday or Today's date.
Stop	The purpose of this field changes depending upon which ***Date Range*** option has been chosen. If **Special** is chosen, enter the last date you wish to display on the report. If **Pay Period** is chosen, this field will display the last date of the selected pay period. If **Yesterday** or **Today** are chosen, this field will display Yesterday or Today's date.

Yesterday	Select this option to choose yesterday's date.
Today	Select this option to choose today's date.
Forecasting	Check this box to include hours forecasted from schedule (not worked yet) on the reports.
Reprocess	Check this box to reprocess punch information prior to running the report. **NOTE**: This significantly slows down the running of the report and is unnecessary if you already have AutoProcessing turned on.
Employees	Select which type of employees you wish to be included on the report. **Active**: The report will print only Active employees. **Inactive**: The report will print only Inactive employees. **Both**: The report will print both Active and Inactive employees.

7. Select the employee(s) for whom you wish to run the report.

   There are four ways to select employees: Individually, Globally, by Group, and by Division.

Select Employees In Reports

Select Employees Individually

- Double-click the Employee you wish to choose. The Employee will be added to the Selected list on the right.

Select Employees Globally

- Click the Add All button. All employees will appear in the Selected list on the right.

Select Employees by Group

- Click the Group button. The Group Selection dialog box will open.

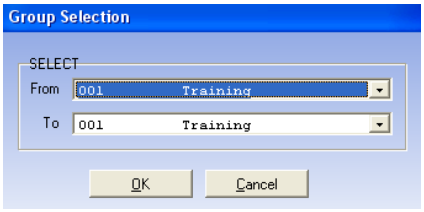


Figure 263: Group Selection

- Use the drop-down to select in the **From** box to select the first Group you wish to choose.
- Use the drop-down to select in the **To** box to select the first Group you wish to choose. (TIP: To choose a single group, select the same Group in both boxes).
- Click OK to accept the changes and return to the dialog box. All employees in the selected Groups will appear in the Selected list on the right.

Select Employees by Division

- Click the Division button. The Division Selection dialog box will open.

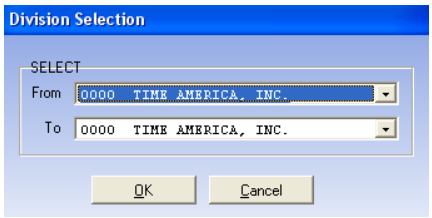


Figure 264: Division Selection

- Use the drop-down to select in the **From** box to select the first Division you wish to choose.
- Use the drop-down to select in the **To** box to select the first Division you wish to choose. (TIP: To choose a single Division, select the same Division in both boxes).
- Click **OK** to accept the changes and return to the dialog box. All employees in the selected Divisions will appear in the Selected list on the right.

8. When all settings are complete, click **OK** to proceed to the *Additional Reporting Parameters* dialog box.

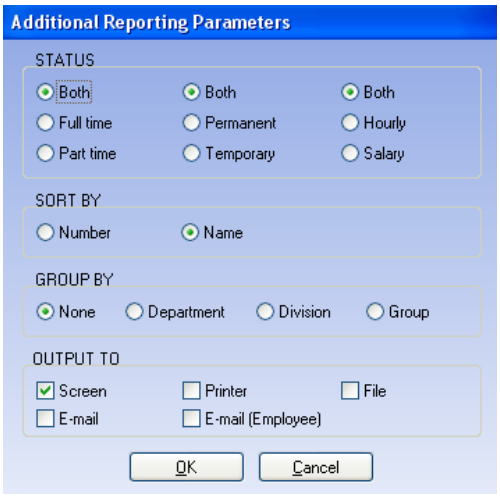


Figure 265: Additional Reporting Parameters

9. The *Additional Parameters* dialog box allows you to further filter and group report data. Fill in the settings as appropriate:

Setting	Definition
Status	These settings allow you filter which employees' data will be printed.
Full Time/Part Time/Both	Check **Full Time** to print only employees whose Status is **Part Time**.
	Check **Part Time** to print only employees whose Status is **Full Time**.
	Check **Both** to print both Full Time and Part Time employees.
Permanent/Temporary/Both	Check **Permanent** to print only employees whose Status is **Permanent**.
	Check **Temporary** to print only employees whose Status is **Temporary**.
	Check **Both** to print both Permanent and Temporary employees.
Hourly/Salary	Check **Hourly** to print only employees whose Status is **Hourly**.
	Check **Salary** to print only employees whose Status is **Salary**.
	Check **Both** to print both Hourly and Salary employees.
Sort By	Select the setting by which you want employee records to sort. The options are **Number** (Employee ID Number) or **Name**.

Group By	Select the setting by which you want employee records to group (organize). The options are **None, Department, Division** and **Group**.
Output to	Select the media to which you wish to output the report. The options are: **Screen**: The report will preview on screen. You are then able to print from the preview. **Printer**: The report will be sent directly to the printer. **File**: The report can be created in several file types including RTF, PDF and Excel. **Email**: The report will be sent via email. If you choose this option, you will be given an additional screen to enter the email recipients. (See ***Emailing a Report***, page 297). **Email (Employee)**: The report will be sent via email. If you choose this option, you will be given an additional screen to select the employee.

10. When all settings are complete, click the **OK** button to run the report.

    NOTE: At this point some reports may prompt for additional information particular to that specific report. You may also be prompted for Email recipient information, if you choose to send a report via email.

11. The report will output to your choice (Screen, Printer, File or Email.)
12. After receiving the report, click the **Close** button until you have exited all the dialog boxes.

On Screen Report Preview

If you chose to output the report to Screen, a Report Preview window will open. This window will display the report as it will be printed and allows you to print directly from this window.

1. Run the report of your choice, selecting ***Output to Screen***. See ***Running a Report***, page 285.
2. The *Report Designer* window for the selected report will open to preview your report.

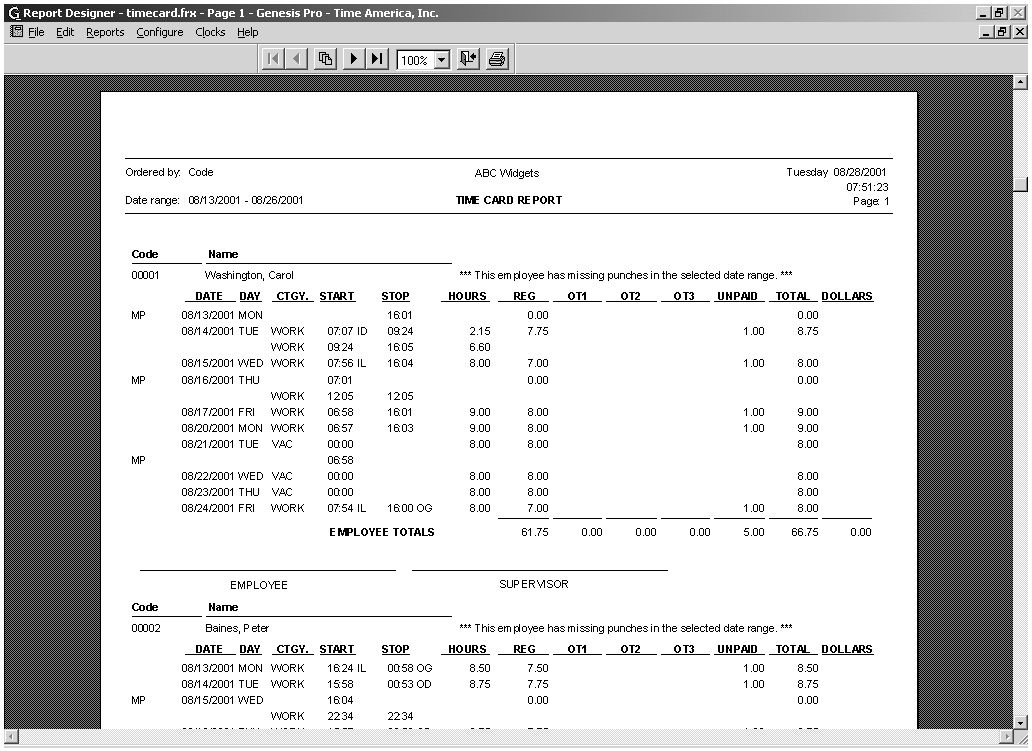


Figure 266: Example: On Screen Report Preview

Figure 267: Print Toolbar

3. The *Report Preview* window contains several tool buttons. Reading from left to right, these are:

Setting	Definition
First Page	Click this button to navigate to the first page of a multi-page report.
Previous Page	Click this button to navigate to the previous page in a multi-page report.
Go To Page	Click this button to enter the page to which you wish to go.
Next Page	Click this button to navigate to the next page in a multi-page report.
Last Page	Click this button to navigate to the last page of a multi-page report.
Zoom	Use this box to change the zoom percentage of the report to show more or less of the report on screen.
Close Preview	Click this button to exit the Report Preview screen.

Print	Click this button to print the report to the printer currently selected under File, Print. (See ***Important Information on Printing Reports***, page 284).

4. Click the **Close Preview** button to exit the *Report Preview* screen.
5. Click the **Close** button until you have exited all the dialog boxes.

Emailing a Report

Genesis Pro allows you to email reports in Adobe Acrobat format using the email program currently configured on your computer. Genesis Pro will attach the report to an email and place it in the outgoing email queue of your email program. Your email program will then be responsible for sending the email. The title of the email will be the same as the report you have chosen, and the text of the message will include the date and time at which the report was run.

When you output a report to email, you will be asked to fill in the email addresses of the recipients.

1. Run the report of your choice, selecting ***Output to Email***. (See ***Running a Report***, page 285.) The *Email Recipients* dialog box will open.

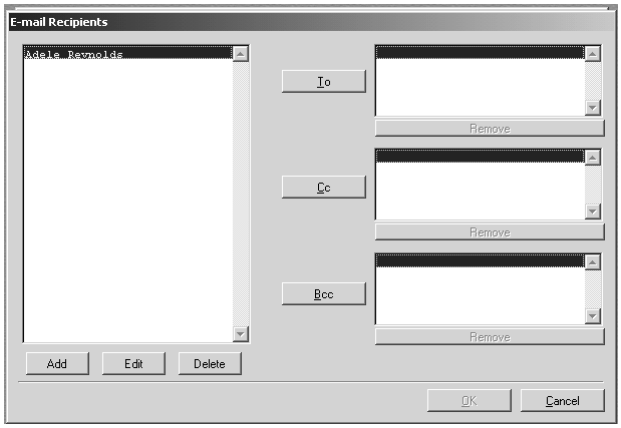


Figure 268: Email Recipients

2. Fill in the settings as appropriate:

Setting	Definition
Recipient List	Displays a list of the recipients to whom you've sent reports to in the past.
Add Button	Click this button to add a new recipient. You will be prompted to enter the person's name and email address.
Edit Button	Click this button to edit an existing recipient's information. You will be prompted to enter the person's name and email address.
Delete Button	Click this button to delete an existing recipient's information.
To Button	Click this button to add the selected recipient to the **To**: field of your email.

CC Button	Click this button to add the selected recipient to the **CC**: (Courtesy Copy) field of your email.
BCC Button	Click this button to add the selected recipient to the **BCC**: (Blind Courtesy Copy) field of your email.
Remove Button	Click this button to remove a recipient added in error.

3. When all recipients are added, click the **OK** button to send the email. You will see a "Processing email" message, but the email will not appear on screen.
4. After the email is processed, click the **Close** button until you have exited all the dialog boxes.
5. You can view the sent email from the sent mail folder of your email program (for example, MS Outlook's Sent Items folder). The email will appear something like this:

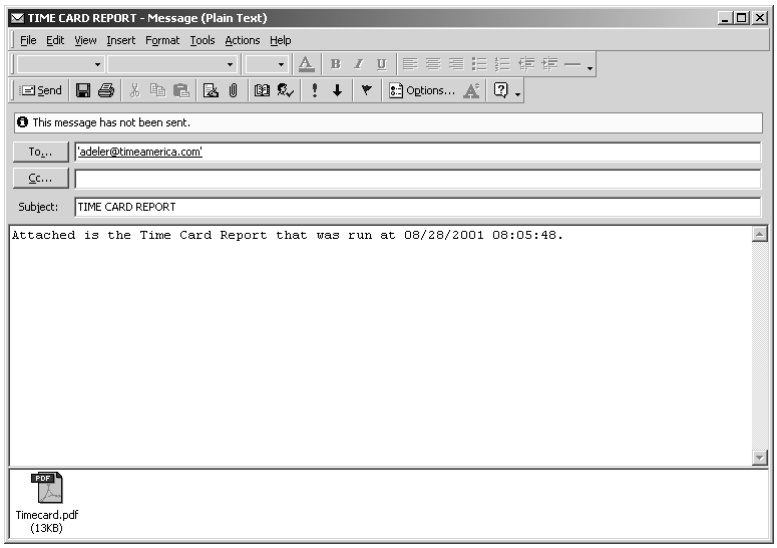


Figure 269: Example: Emailed Report

Report Editor

The Report Editor allows you to:

- Save a report to a new name for editing.
- Make modifications to a report.
- Move a report to another reports category.
- Delete a report that has been saved to another name. (You cannot delete a standard report that comes with the system).

Not all reports can be modified or copied. If a report can be edited, the appropriate buttons will become available automatically.

NOTE: The Report Editor uses FoxPro's report editing tools, which are beyond the scope of this manual. If you wish to create new reports or make extensive modifications to an existing report, you should become proficient with FoxPro's report editor.

Report Maintenance

1. Click the **Reports** menu**, Report Editor, Maintenance**. The *Report Maintenance Selection* window will open.

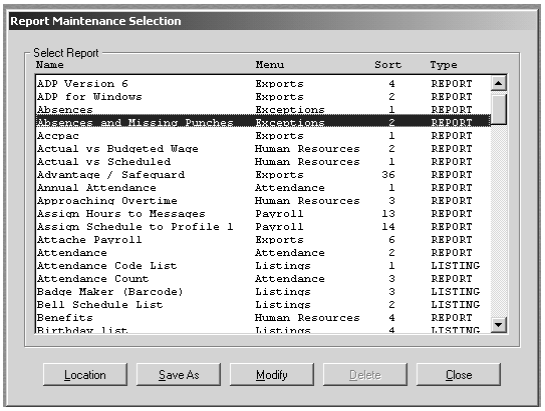


Figure 270: Report Maintenance Selection

2. The *Report Maintenance Selection* dialog box contains the following information:

Setting	Definition
Report Listing	Displays a listing of all the reports in you Genesis Pro database.
Location Button	Allows you to change the report category under which the report appears.
Save As Button	Allows you to copy a report (in order to create a new one, etc.).
Modify Button	Allows you to change an existing report.
Delete Button	Allows you to delete a custom report (you cannot delete the standard reports).

Relocate a Report

Genesis Pro allows you to move a report from one report category to another. For example, you might want the Who's Not In report to appear in the Exceptions category rather than the Attendance category.

1. Navigate to the *Report Editor*. See ***Report Editor***, page 298.
2. Highlight the report you wish to relocate.
3. Click the **Location** button. The *Location* dialog box will open.

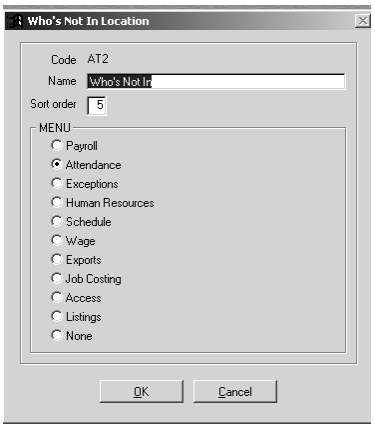


Figure 271: Report Location

4. Fill in the settings as appropriate:

Setting	Definition
Code	Displays the code for the selected report.
Name	Displays the current name of the report. You may edit this setting to change the display name of the report.
Sort Order	Enter a number that indicates where in the list of reports this item will appear (1 for the top, 2 for the second position down, etc.).
Menu	Select the report category under which you wish this report to appear. **NOTE**: Choosing **None** removes the report from the menu entirely, but retains the report definition in case you wish to reinstate it later.

5. Click **OK** to commit the changes and return to the *Report Maintenance Selection* screen.
6. Click **Close** to exit the dialog box.

Copy a Report

Copying a report enables you to create a new report that builds upon an existing report (so you don't have to reinvent the wheel).

1. Navigate to the *Report Editor*. See ***Report Editor***, page 298.
2. Highlight the report you wish to copy.
3. Click the **Save As** button. The *Save As* dialog box will open.

   NOTE: Not all reports can be copied. The **Save As** button will only be available for reports that can be copied.

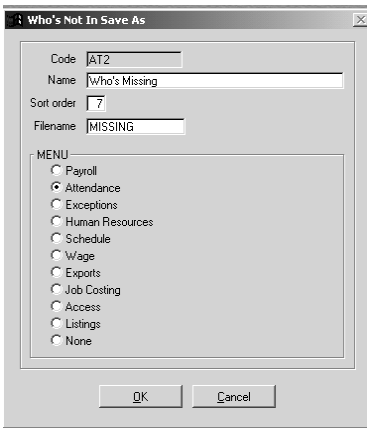


Figure 272: Report Save As

4. Fill in the settings as appropriate:

Setting	Definition
Code	Displays the code for the selected report.
Name	Displays the current display name of the report. You may edit this setting to change the display name of the report.
Sort Order	Enter a number that indicates where in the list of reports this item will appear (1 for the top, 2 for the second position down, etc.).
File Name	Enter the file name under which this report should be saved. The name must be 4 characters or more. Do not enter a file extension, as Genesis Pro will assign it automatically.
Menu	Select the report category under which you wish this report to appear. **NOTE**: Choosing **None** removes the report from the menu entirely, but retains the report definition in case you wish to reinstate it later.

5. Click **OK** to commit the changes.
6. The **Confirm Save** screen will open. This screen notifies you of the file names associated with your copied report. More than one file name may appear, as each indicates a slightly different sorting and grouping order for the report.

Figure 273: Confirm Save

7. Click **OK** to confirm the save and return to the *Report Maintenance Selection* screen. Your new report will be selected in the list.
8. You may now modify the report as desired. See below.

Modify a Report

You can modify existing or copied reports.

NOTE: The *Report Editor* uses FoxPro's report editing tools, which are beyond the scope of this manual. If you wish to create new reports or make extensive modifications to an existing report, you should become proficient with FoxPro's report editor.

1. Navigate to the *Report Editor* dialog box. See ***Report Editor***, page 298.
2. Highlight the report you wish to modify.
3. Click the **Modify** button. The *Modify Report Selection* dialog box will open.

   NOTE: Not all reports can be modified. The **Modify** button will only be available for reports that can be copied.

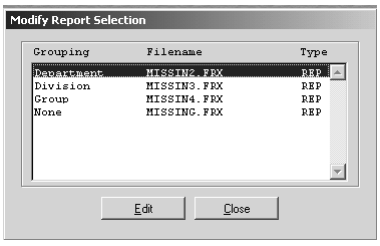


Figure 274: Modify Report Selection

4. Highlight the report you wish to modify and click the **Edit** button. The *Report Designer* window will open.

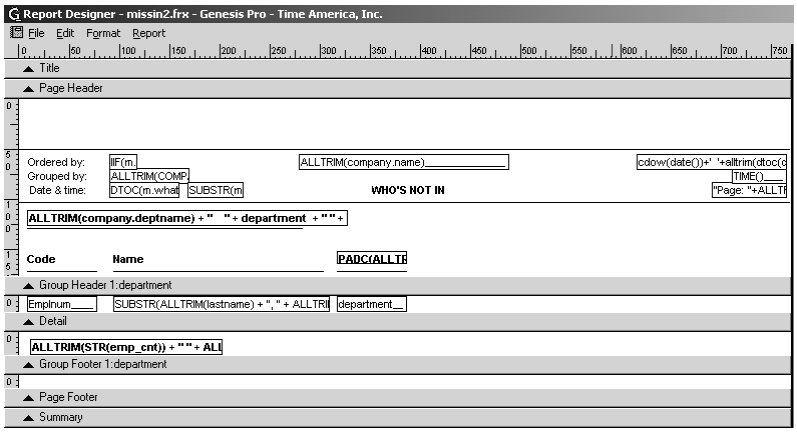


Figure 275: Report Designer

5. Modify the report definition as desired.
6. When all changes are complete, close the *Report Designer* window (saving if necessary)
7. Click **Close** to exit the *Modify Report Selection* window or select another report to modify.
8. Click **Close** to exit the *Report Maintenance Selection* window.

Delete a Copied Report

Only copied reports can be deleted: Genesis Pro standard reports cannot be deleted.

1. Navigate to the *Report Editor* dialog box. See ***Report Editor***, page 298.
2. Highlight the report you wish to delete.
3. Click the **Delete** button. You will be prompted.

   NOTE: Not all reports can be deleted. The **Delete** button will only be available for reports that can be deleted.

Figure 276: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Report Maintenance Selection* dialog box.

Chapter XI Terminal Configuration

This section covers the concepts and tasks associated with setting up clocks.

Genesis Pro Supports the use of three types of clocks: TA520/530, TA620, PC Clock and TASC. Support for ATS and Hand Reader, Videx DuraTrax clocks is available in additional modules.

For each clock, the following parameters must be defined:

- ***Communication Type (RS232, RS485, Internal/External modem, or Ethernet)***
- ***PC Comm Port used for communication***
- ***Baud Rate***
- ***Function Keys***
- ***Default Levels***
- ***Access Control (if applicable)***
- ***Profiles (if applicable)***
- ***Table Validation (if applicable)***
- ***Bell Schedule (if applicable)***

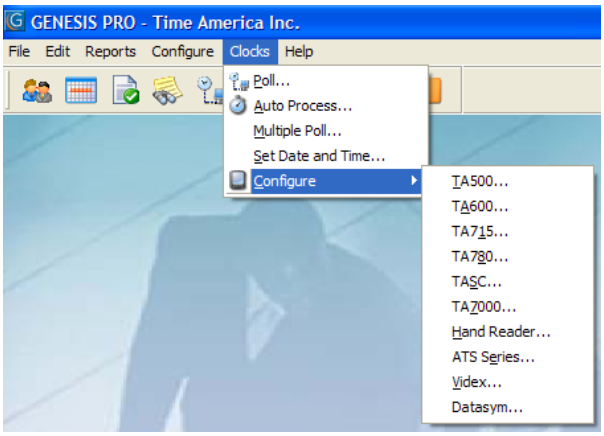


Figure 277: Clocks Menu

Types of Connections

Time America clocks are capable of communicating in one of four different ways:

- The **Direct** or **RS-232** serial port solution is designed for a single, short-range terminal. The terminal should not be placed beyond 50 feet of shielded wire from a PC. Each terminal requires its own serial connection to a PC using an RS-232 serial port.
- The **LAN** or **RS-485** solution is designed for a direct connection, long-range, single or multi-terminal system. RS-485 allows up to 32 terminals to be networked to one PC serial port, creating a Local Area Network (LAN). Each terminal is connected to a LAN distribution box. These boxes connect to the Polling PC with two conductor-

shielded cable. The total length of the serial connection can be as much as 5000 feet (almost 1 mile). Each terminal is identified using a unique ID.

- The **modem** option is designed for a single- or multi-unit environment. The modem solution provides two additional options: **internal modem** or **external modem**. Generally, this option is utilized when the terminal is located out of cabling range or if the use of cabling is being avoided. When data needs to be downloaded, Genesis Pro can place a call (using a modem in the PC) to the terminal, download the information and disconnect.

  NOTE: The computer that polls the clocks will need a modem in order to call the clock. Time America recommends U.S. Robotics modems, as they are capable of communicating with the clock at the 1200 and 2400-baud rates required.

- The **Ethernet** connection is designed for Local or Wide Area Networks using the TCP/IP protocol. The terminal is connected to the network through a hub, just like any other computer on the network.

As part of the configuration of the clock, you will choose the type of connection for each clock. The configuration dialog box will prompt you for information specific to the type of connection you have chosen.

Smart Converters

Using a Smart Converter, Genesis Pro can transform a LAN clock into a Modem clock.

TA500, TA600 and TA7000 Series (TA520/530, TA620, TA7000)

Configuration of the **TA500 Series**, **TA600 Series and TA7000 Series** time clocks is virtually identical. For this reason, they are combined into one section.

Since multiple clocks can be defined in the Genesis Pro, a copy feature is available to copy an existing clock's parameters when adding a new clock. This eliminates the need to re-enter an entirely new clock configuration.

Configure a TA500/TA600/TA7000 Series Clock

1. Click the **Clocks** menu**, Configure, TA500** or **TA600** or **TA7000**. The *Configure Clock* dialog box will open. The dialog box contains several tabs, all of which are described below.

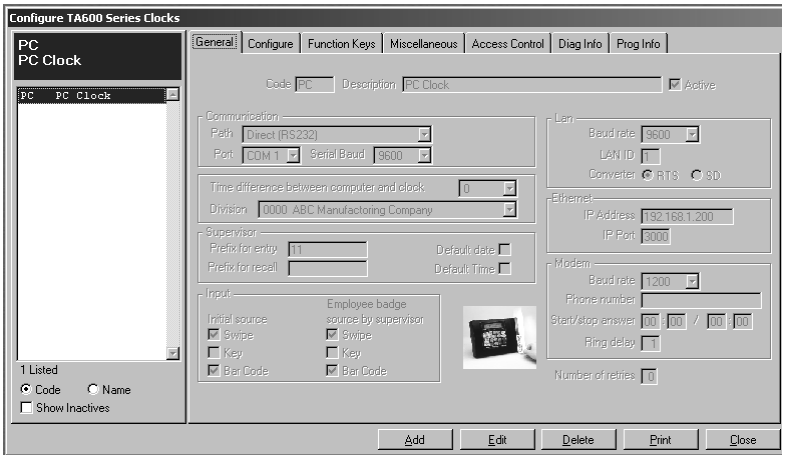


Figure 278: Configure TA500/TA600/TA7000 Clocks: General Tab

2. The *General* tab defines the communication and general operation settings and contains the following information:

Setting	Definition
Code	This is a required field. Enter a unique code (up to 4 characters) to identify the clock. Once defined, this code cannot be changed.
Description	Enter a description of the clock. This description will be seen in the system and on reports. This field can be used to describe the clock type and it's location in your facility (i.e. TA530 In BUILDING TWO). The clock description can be up to 30 characters long.
Active	Click the Active check box to indicate that the clock is currently in use. Uncheck this box if the clock is not being used at this time.
Revision 5 or 6	THIS WILL ONLY SHOW FOR THE TA600 SERIES Select the appropriate revision – you can check the revision by powering up the clock.
Path	Select the type of connection this clock will use. The options are: • Direct (RS232) • LAN (RS485) • Modem (Internal) • Serial LAN (Smart Converter) • Remote Direct (External Modem) • Modem LAN (Smart Converter) • Ethernet For more information on these connections, see ***Types of Connections***, page 304.
Port	Select the communications port on your computer that will be used to communicate with the clock. The factory default is **COM 1.**
Serial Baud	This is the Direct connection (RS232) in the Communication Path field. • RS232 Baud = 9600 for all clocks
Lan	These settings become available when LAN has been chosen as the communication type in the Communication Path field.

Setting	Definition
Baud Rate	The default is **9600** baud. Make sure the baud rate selected here matches the baud rate defined at the clock. All clocks use 9600 for LAN. The TA600 can go as high as 19200. **TIP**: You can use the Configuration Badge (000000000) at the clock to view/modify the clock's baud rate.
LAN ID	Enter the clock's unique identification number in this field. This number provides a way for the system to distinguish between individual clocks. Any one-character (alphabetic or numeric) ID may be used. Make sure the LAN ID defined here matches the LAN ID defined at the clock. **TIP**: You can use the Configuration Badge (000000000) at the clock to view/modify the clock's LAN ID.
Converter	Select the type of converter used in the LAN setup. The RTS converters have been phased out over the years and were mainly used with AT style computers that used a 25 pin serial port. Most new computers use 9 pin serial ports that connect to the newer SD style converters. If you are unsure which you have, contact your dealer.
Ethernet	These settings define how an Ethernet clock will communicate with Genesis Pro.
IP Address	Enter the IP address assigned to the Etherlink converter. DO NOT enter leading zeros.
IP Port	Displays the port used on the Etherlink Converter. The default is **3000** and should not be changed. Altering this number will result in communication failure, and the possibility of only being able to connect to the Etherlink Converter serially.
Modem	These settings define how a modem clock will communicate with Genesis Pro.
Baud Rate	Select the modem's communication speed. Make sure the baud rate selected here matches the baud rate defined at the clock. **NOTE**: The maximum baud rate for the TA500 internal modem is **1200** and the maximum baud rate for the TA600 internal modem is **2400**. The maximum baud rate for the TA7000 internal modem is **TBD**.

Setting	Definition
Phone Number	Enter the phone number the PC modem must dial to communicate with this clock. The number must be entered in the following format: **Outside Line Access Code, Wait Symbol, Area Code, Phone Number** If no outside line is required (such as 9), simply enter the phone number. Omit the area code if not applicable. On most modems, the wait symbol is a comma (,) typically representing a one second pause. Multiple wait symbols can be used if necessary.
Start/Stop Answer	These fields control the time of day the clock's internal modem will answer an incoming call. Enter the modem's start and stop answer time in military format (HH:MM). For example, to set the modem to answer only between 7:00 A.M. and 6:00 P.M., enter **07:00** and **18:00** in the fields provided. The default is **00:00** (midnight) and **23:59** (one minute before midnight). In other words, the modem will answer any time it is called during the day.
Ring Delay	Enter the number of rings that the clock should wait before picking up the line. For example, setting the **Ring Delay** to **4** means that after the clock detects a ringing phone; it will wait 4 rings before answering. **0** means DO NOT ANSWER.
Number of Retries	Enter the number of times the computer should attempt to connect to the clock if communication either fails or is interrupted during polling.
Time Difference Between Computer and Clock	Enter the time difference (in hours) between the computer and time clock. Since the computer can set the clock's time, this field compensates for time zone differences between the computer's location and the clock's location. When the clock's time is set, the system either adds or subtracts this time difference from the computer's clock. A setting of **0** indicates that the clock and computer are in the same time zone.
Division	Select the company division where the clock is located. Every transaction entered on this clock is tagged with this division code.
Supervisor	These options define supervisor settings for the clock.

Setting	Definition
Prefix for Entry	Enter the prefix code used by the terminal to identify a supervisor's badge. Any badge starting with this prefix can access the clock's Supervisor Mode. Using this mode, a supervisor can add, view, or delete transactions in the time clock. The default prefix is **11**. For example, badge number *11*2345 can access Supervisor Mode
Prefix for Recall	Enter the prefix code used by the terminal to identify a recall badge. Any badge starting with this prefix can access the clock's Recall Mode. In Recall Mode, a person can view previous time transactions but not add, edit, or delete transactions.
Default Date	Check this box to automatically use the clock's current date for transactions added using a supervisor's badge. When this check box is clear, the clock prompts the supervisor for the date of any new transactions.
Default Time	Check this box to automatically use the clock's current time for transactions added using a supervisor's badge. When this check box is clear, the clock prompts the supervisor for the time of any new transactions.
Input	These settings determine how data can put entered into the clock.
Initial Source	Check the applicable check box(es) to indicate the method by which an *employee* badge number is entered into the clock.
Swipe	The employee's badge number can be entered by swiping a badge.
Key	The employee's badge number can be entered by pressing keys on the clock keypad.
Bar Code	The employee's badge number can be entered by scanning a bar code.
Employee Badge Source By Supervisor	Check the applicable check box(es) to indicate the method by which a *supervisor* (in supervisor mode) can enter employee badge number into the clock.
Swipe	The employee's badge number can be entered by swiping a badge.
Key	The employee's badge number can be entered by pressing keys on the clock keypad.
Bar Code	The employee's badge number can be entered by scanning a bar code.

3. The *Configure* tab defines the message and timeout settings and contains the following information:

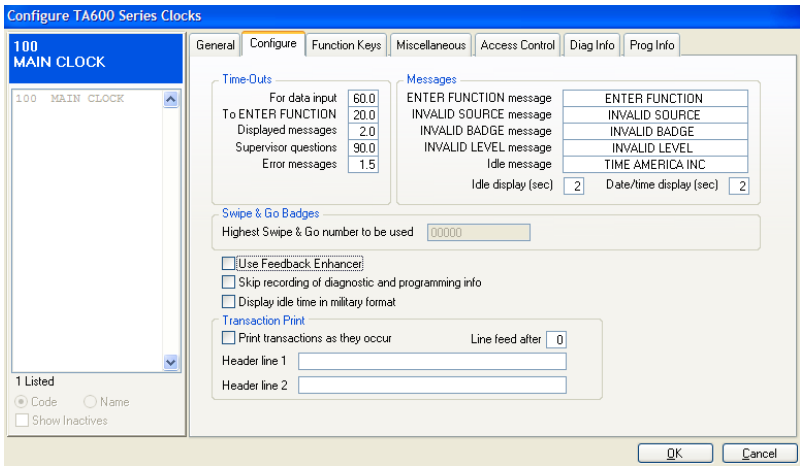


Figure 279: Configure TA500/TA600/TA7000 Clocks: Configure Tab

Setting	Definition
Time-Outs	These settings determine how long prompts and messages will appear on the clock's screen.
For data input	Enter the length of time (from **0.1** to **99.9** seconds) the clock will wait for a response to a prompt before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **10.0** means that the clock will wait 10 seconds for a response after prompting for input. The default is **60.0** seconds
To Enter function	Enter the length of time (from **0.1** to **99.9** seconds) the clock will wait for a response to enter a function before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **5.5** means that the clock will wait 5½ seconds for a response after prompting for input. The default is **20.0** seconds.
Displayed messages	Enter the length of time (from **0.1** to **99.9** seconds) the clock will display any message before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **1.5** means that the clock will display messages for 1½ seconds. The default is **2.0** seconds.
Supervisor questions	Enter the length of time (from **0.1** to **99.9** seconds) the clock will wait for a response to a supervisor question before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **30.0** means that the clock will wait 30 seconds for a supervisor's response to a question such as "Employee Badge #". The default is **90.0** seconds

Setting	Definition
Error messages	Enter the length of time (from **0.1** to **99.9** seconds) the clock will display any error message before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **1.0** means that the clock will display error messages for one second. The default is **1.5** seconds.
Messages	These settings define the text prompts for certain operations at the clock.
Enter Function	This field allows you to replace the default ENTER FUNCTION message with a custom message (up to 16 characters in length). This message is displayed after swiping a badge or entering a badge number at the clock.
Invalid Source	This field allows you to replace the standard INVALID SOURCE message with a custom message (up to 16 characters in length). This message will display when an input source is used that the terminal has been programmed to ignore. For example, the employee uses a magnetic strip badge to punch In when only keypad entry is recognized.
Invalid Badge	This field allows you to replace the standard INVALID BADGE message with a custom message (up to 16 characters in length). An INVALID BADGE message displays when a badge or card other than the specified badge length is used.
Invalid Level	This field allows you to replace the default INVALID LEVEL message with a custom message. This message is displayed when Validation is used, and an invalid level number is entered. It cannot be more than 16 characters.
Idle Message	Enter the message text that displays on the time clock when in an idle state. If this field is left blank, no message will be displayed. The idle message will hold up to 16 characters.
Idle Display (sec)	Enter the length of time (from **1** to **60** seconds) that the idle message displays before switching to the date and time. The default is **2**. **0** indicates the idle message should not display.
Date/Time display (sec)	Enter the length of time (from **1** to **60** seconds) that the Date and time display before switching back to the idle message. The default is **2**. **0** indicates the date and time should not display.

Setting	Definition
Swipe & Go Badges	If the Swipe & Go feature is used enter the highest badge number that the terminal will recognize as a Swipe & Go badge. For example, if **2000** is entered here, only badge numbers 0001 through 2000 are considered Swipe & Go badges. All badge numbers above 2000 are treated as "normal" badges requiring the employee to enter a function key to complete the transaction (Clock In or Out, Out to Lunch, In from Lunch, etc.). **NOTE**: The Swipe & Go feature is enabled in the Main Company configuration screen. See ***Main Company***, page 28.
Use feedback enhancer	Select this check box to use the optional Feedback Enhancer (if applicable). If the Feedback Enhancer is not being used, do not select this check box. **NOTE:** The TA500 series clocks need to be wired for bells and access for this feature to work.
Display idle time in military format	Click this check box to display the clock's idle time in military format (i.e. a 24-hour format). Clear this box to display the clock's idle time in standard format (i.e. a 12-hour clock). In both cases, the time is displayed using the HH:MM:SS format.
Skip recording of diagnostic and programming info	Check this box to skip recording the Diagnostic and Programming information that display on the *Diag Info* and *Prog Info* tabs. These two files are created and written to each time a clock is communicated with and programmed using Genesis Pro. This information is used for troubleshooting communication problems. These files slow the polling process down, although not noticeably, and can be turned off by checking the box. **NOTE**: Turning off these files will make it difficult to troubleshoot certain communication problems.
Print Transactions as they occur	If a printer is connected to the time clock's serial port (TA500) or parallel port (TA620), check this box to print time transactions as they are entered at the terminal. Uncheck this box if a printer is not attached to the clock or you do not wish print transactions
Line Feed After	Controls how many lines should feed after the receipt has printed.
Header line 1	Enter the first line of the header you wish to print on all transaction listings printed directly from the terminal. Up to 40 characters may be entered in this field. The default is blank indicating Header line 1 will not be printed.

Setting	Definition
Header line 2	Enter the second line of the header you wish to print on all transaction listings printed directly from the terminal. Up to 40 characters may be entered in this field. The default is blank indicating Header line 2 will not be printed.

4. The *Function Keys* tab allows you customize the clock's keypad. As customizing the keypad can be an extensive process, a section of this manual has been dedicated to it. See ***Customizing Function Keys***, page 370. This section merely describes the contents of the screen.

   The tab contains the following information:

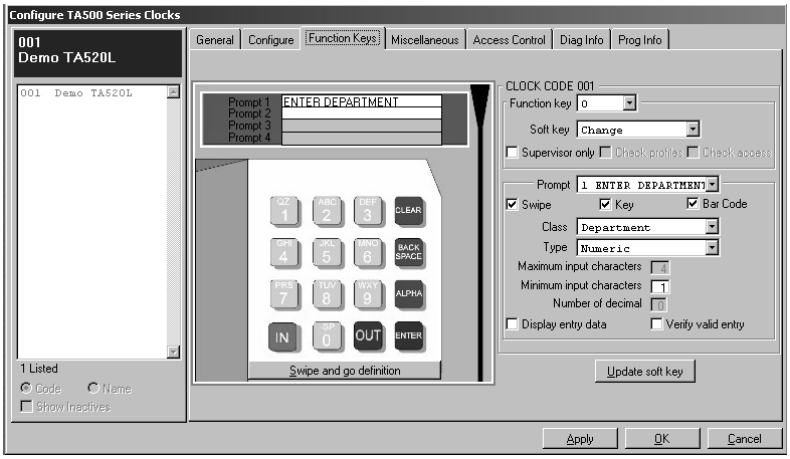


Figure 280: Configure TA500 Clock: Function Keys tab

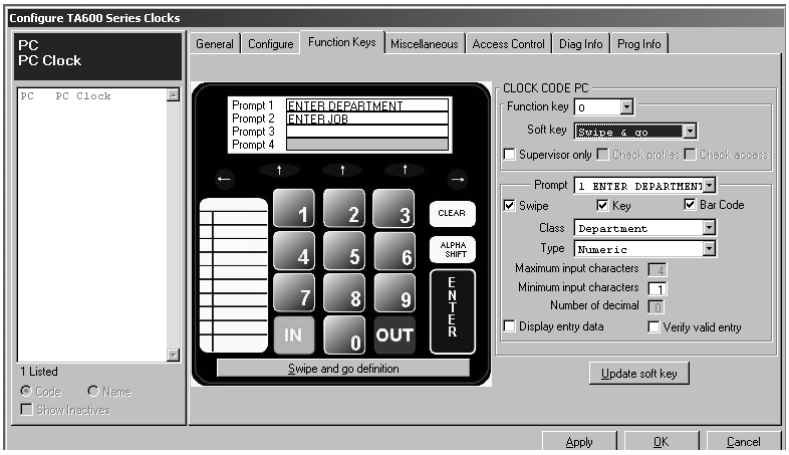


Figure 281: Configure TA620 Clock: Function Keys tab

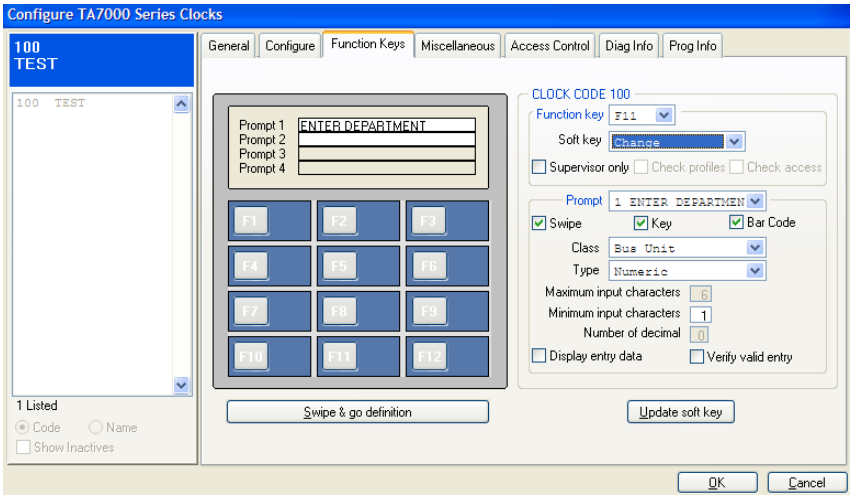


Figure 282: Configure TA7000 Clock: Function Keys tab

Setting	Definition
Clock Code	Displays the unique ID code assigned to this clock.
Function Key	Displays the function key number of the key selected on the keypad graphic to the left.
Soft Key	Displays the software function currently assigned to the selected key. See page 371 for a description of the functions available.
Supervisor only	Check this box to allow only supervisor access to this function key. (Supervisor access is gained by swiping a supervisor badge in the clock.) This is used for function keys that collect data or change employee assignments, such as Group Transfer or Category Entry. Clearing this box permits any employee to access this function key.

Setting	Definition
Check Profiles	Check this box to enforce Profile Lockouts. This option is only used when the optional Access Control and Profile Lockout module is installed. Checking this box means that when an employee swipes a badge and presses this function key, the clock will check the Profile information to make sure the employee is allowed to use clock during this time. If the box is unchecked, the Profile table will not be accessed to verify the information. **NOTE**: The Profile Access Module needs to be installed, and a Profile needs to be assigned to the clock, before this checkbox is available. This option will work only after a Profile is setup, assigned to the correct employees, and assigned to the clock. The clock needs to be polled with the Program clocks and Load Profile Tables options checked.
Check Access	Check this box to enforce Profile Access. Access is used to open doors or other electric lock type enclosures. If a valid badge is used, the door will open. When used in conjunction with Profiles, Profiles will take over the verification process. If the employee is confirmed to be able to use this function key at this time, the door will open. **NOTE**: The Profile Access Module needs to be installed, and Access must be defined for the terminal, before this checkbox is available.
Prompt	Displays the prompt associated with the function key. The prompts themselves are entered in the Prompt area in the upper left corner of the keypad display. Up to four prompts are available. For more information on creating custom prompts, see page 371.
Swipe	Check this box to indicate that employees must swipe a magnetic badge to enter the information requested by the prompt. **Example:** Enter Department
Key	Check this box to indicate that employees may key the information requested by the prompt. **Example:** Enter Tips
Bar Code	Check this box to indicate that employees must swiped a bar code to enter the information requested by the prompt. **Example:** Enter Job

Setting	Definition
Class	The Class defines the information being entered, for reporting. For example, is it a department number, tips, etc.? Class choices cannot be added. If None is chosen, the Type setting will not be available. See page 372 for a description of the classes available.
Type	Select the data Type for the information being entered. The settings in Company Defaults of Main company determine which Type options are available for each Class. The options are: **Alphabetic**: Clock will accept letters only for this entry. **Numeric**: Clock will accept numbers only for this entry. **Alphanumeric**: Clock will accept both numbers and letters. **Number with forced decimal places**: Clock will accept numbers only and will automatically place the last two numbers entered behind the decimal place. (For example, if 1499 is entered, the clock will format it as 14.99). **Alphanumeric – hidden entry**: Clock will accept letters only; the letters will not display on the clock's screen. **Number – hidden entry** Clock will accept numbers only; the numbers will not display on the clock's screen.
Maximum Input Characters	Enter the maximum total number of characters that can be entered for this Prompt. The number displayed in this field is based on the Class selected.
Minimum Input Characters	Enter the minimum number of characters that can be entered for this Prompt. The default value for this field is 1, but may be changed.
Number of Decimal	Enter the number of places after the decimal point for a numeric entry. A maximum of **4** decimal places may be entered. This field will only be available if a Numeric option was chosen in the Class field.
Display Entry data	Check this box to display the input information.

Setting	Definition
Verify valid entry	Check this box to enforce the Validation available with the Job Cost/Validation Module. Validation must be turned on for each level, Download Names must be checked under the miscellaneous tab, and Load Level Validation must be checked as a polling option. The clock will check the input information against the downloaded level information. If the level entry does not exist at the time of the last programming, the data will be considered invalid.
Update Soft Key	Click this button to commit the changes made to a key's functions or settings.
Swipe and Go Definition	Click this button to display the Swipe and Go function, since there is no actual Swipe and Go function key. Swipe and Go occurs when an employee swipes a card through the clock, and is not asked to enter a function. Selecting Swipe on the Function Key dropdown menu provides the same information. The Swipe and Go function will work with all methods of punching, as long as it is activated under Configure Main Company. (See ***Main Company***, page 28).

5. The *Miscellaneous* tab defines clock defaults and contains the following information:

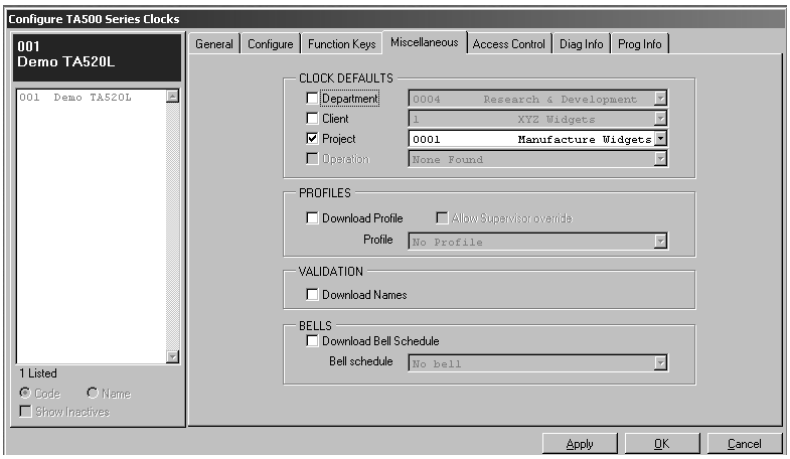


Figure 283: Configure TA500/TA600/TA7000 Clocks: Miscellaneous tab

Setting	Definition
Clock Defaults	Used with the “Level change to clock default” function key. This will transfer an employee to levels that have been assigned to the clock. **NOTE:** This is part of the Job Costing module.
Department	Select the default Department for this clock.

Setting	Definition
Job	Select the default Job for this clock, if applicable.
Step	Select the default Step for this clock, if applicable.
Operation	Select the default Operation for this clock, if applicable.
Download Profile	Check this box to have the Profile assigned to this clock download to the clock. Assign the Profile from the Profile box below. This must be done to cause Profile Lockouts to take effect. **NOTE:** The Profile Access must be turned on.
Allow Supervisor override	Check this box to allow a supervisor (swiping a supervisor badge) to override a lockout. This enables the supervisor to punch on behalf of an employee when the employee is locked out.
Profile	Select the profile to be assigned to this clock. You must check the Download Profile box in order to make sure that the Profile is enforced at the clock.
Validation: Download Names	Check this box to download valid Department, Job, Step and Operation names to the clock. This option is only available with the Job Costing/Validation module. **NOTE**: Load Level Validation also needs to be checked in the Polling Options for the clock for this setting to take effect.
Download Bell Schedule	Check this box to download a pre-defined Bell Schedule to this clock. This option is only available with the Bell Schedule module.
Bell Schedule	Select the pre-defined Bell Schedule you wish to assign to this clock.

6. Access Control allows the clock to control who can enter a building and when. The clock can be Access Only, or it can accept Time and Attendance punches as well.

   NOTE: These settings are only available with the Access Control module.

   The *Access Control* tab defines the building access settings and contains the following information:

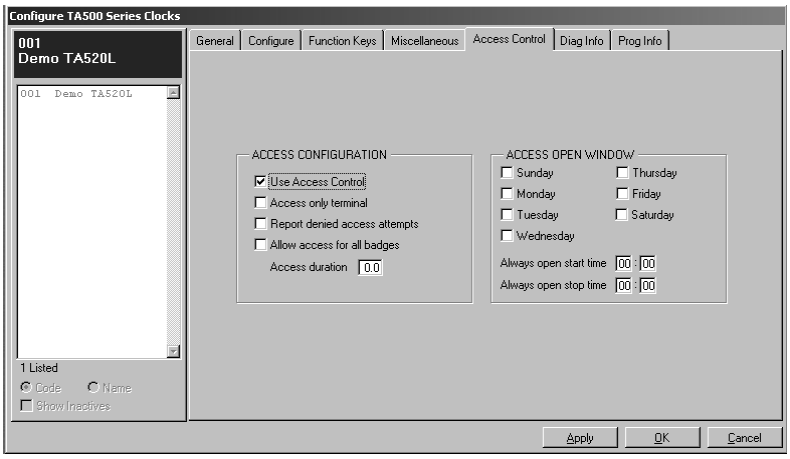


Figure 284: Configure TA500/TA600/TA7000 Clocks: Access Control tab

Setting	Definition
Use Access Control	Check this box to configure Access Control for this clock.
Access only terminal	Check this box to use this clock for building access only. The clock will not record time punches such as Clock In, Start Lunch, etc.
Report denied access attempts	Check this box to have rejected punches recorded for reporting purposes. **NOTE**: This option only works in conjunction with Profiles. If Profiles are not used, all punches are defined as Accepted, and will show as such on the report.
Allow access to all badges	Check this option only when Access is being used in conjunction with Profiles. If Profiles have **not** been downloaded to the clock, and this option is checked, **any** badge of the correct length will cause the clock to grant access (open the door).
Access duration	Enter the length of time, in seconds that the Access relay will keep the door open.
Access Open Window	These settings are used in conjunction with the always open start and stop times.
Day of the Week	Select the days of the week on which the doors will always be open.
Always open start time	Enter the time of day when the clock unconditionally opens the door. Between this time and the Stop time, the door will remain unlocked: no badge is required for entry. Enter this time in military format.

Always open stop time	Enter the time of day on the days selected when the clock stops opening the door unconditionally. Between this time and the Start time, the door will remain unlocked: no badge is required for entry. Enter this time in military format.

7. The *Diag Info* tab contains the communication information between the computer and the clock after each attempt to communicate.

   NOTE: This tab will be blank if the clock has not been communicated with yet, or if the ***Skip recording of diagnostic and programming info*** option is checked.

8. The *Prog Info* tab contains the information that was sent to the clock after any type of programming.

   NOTE: This tab will be blank if the clock has not been communicated with yet, or if the ***Skip recording of diagnostic and programming info*** option is checked.

9. **NOTE:** This tab will only apply to **TA7000 Clocks** using the **fingerprint** option.

   The *Assignments* tab lists the employees that can use this clock. This is only necessary if you are using fingerprints with TA7000 clocks.

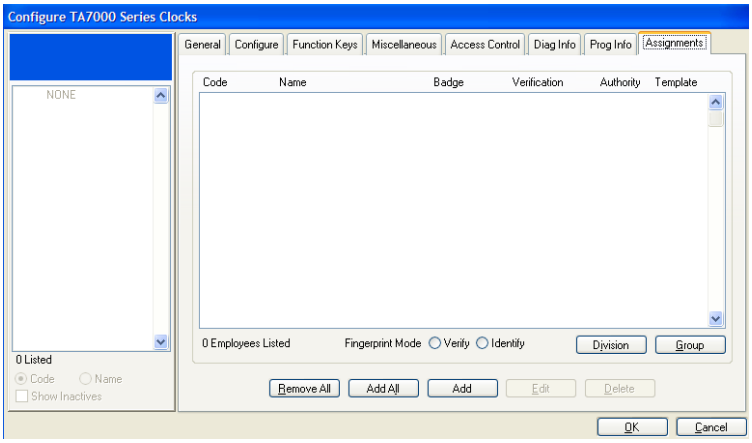


Figure 285: Configure TA7000 Clocks: Assignment tab

The tab contains the following information:

Setting	Definition
Employee Listing	Displays a list of the employees that can use this clock. Includes: employee code, employee name, employee badge number, verification, authority level and if they have a fingerprint template saved.
Fingerprint Mode	**Verify:** This option will only verify employee number with fingerprint. **Identify:** This option will identify employee from the fingerprint only.

Setting	Definition
Division	Click this button to select employees based on Division. Employees selected are assigned the default Authority and Verification automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another ***Authority and Verification.***
Group	Click this button to select employees based on Group. Employees selected are assigned the default Authority and Verification automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another ***Authority and Verification.***
Remove All	Click this button to remove all employees currently assigned to the clock.
Add All	Click this button to assign all employees to the clock. Employees selected are assigned the default Authority and Verification automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another ***Authority and Verification***.
Add	Click this button to select employees individually. You will be prompted to select the following: **Authority**: The Authority Level defines which clock menus employee can view or use at the clock. The following options are available: Employee, Supervisor or Configuration. **Verification:** The Verification Level defines the false read threshold.

TA715, TA777 and TA780 Series

Configuration of the **TA715 Series**, **TA777 Series and TA780 Series** time clocks is virtually identical. For this reason, they are combined into one section.

Since multiple clocks can be defined in the Genesis Pro, a copy feature is available to copy an existing clock's parameters when adding a new clock. This eliminates the need to re-enter an entirely new clock configuration.

Configure a TA715/TA777/TA780 Series Clock

1. Click the **Clocks** menu**, Configure, TA715** or **TA777** or **TA780**. The *Configure Clock* dialog box will open. The dialog box contains several tabs, all of which are described below.

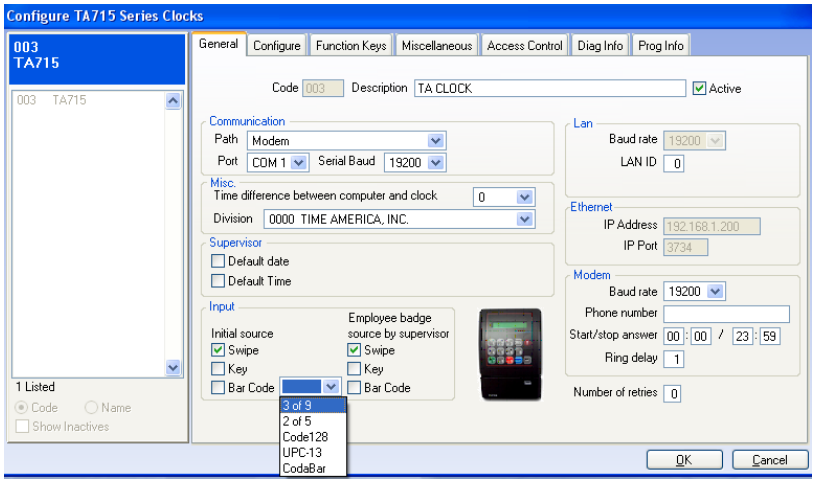


Figure 286: Configure TA715/TA777/TA780 Clocks: General Tab

2. The *General* tab defines the communication and general operation settings and contains the following information:

Setting	Definition
Code	This is a required field. Enter a unique code (up to 4 characters) to identify the clock. Once defined, this code cannot be changed.
Description	Enter a description of the clock. This description will be seen in the system and on reports. This field can be used to describe the clock type and it's location in your facility (i.e. TA715 In BUILDING TWO). The clock description can be up to 30 characters long.
Active	Click the Active check box to indicate that the clock is currently in use. Uncheck this box if the clock is not being used at this time.
Readers None or Finger	THIS WILL ONLY SHOW FOR THE TA780/TA785 SERIES Only select finger if the clock will accept fingerprints.
Path	Select the type of connection this clock will use. The options are: • Direct (RS232) • LAN (RS485) • Modem • Ethernet For more information on these connections, see ***Types of Connections***, page 304.
Port	Select the communications port on your computer that will be used to communicate with the clock. The factory default is **COM 1.**

Setting	Definition
Serial Baud	This is the Direct connection (RS232) in the Communication Path field. • RS232 Baud = 19200 for all clocks
Lan	These settings become available when LAN has been chosen as the communication type in the Communication Path field.
Baud Rate	The default is **19200** baud. Make sure the baud rate selected here matches the baud rate defined at the clock. All clocks use 19200 for LAN.
LAN ID	Enter the clock's unique identification number in this field. This number provides a way for the system to distinguish between individual clocks. Any one-character (alphabetic or numeric) ID may be used. Make sure the LAN ID defined here matches the LAN ID defined at the clock. The default is 0.
Ethernet	These settings define how an Ethernet clock will communicate with Genesis Pro.
IP Address	Enter the IP address assigned to the Etherlink converter. DO NOT enter leading zeros.
IP Port	Displays the port used on the Etherlink Converter. The default is **3734** and should not be changed. Altering this number will result in communication failure, and the possibility of only being able to connect to the Etherlink Converter serially.
Modem	These settings define how a modem clock will communicate with Genesis Pro.
Baud Rate	Select the modem's communication speed. Make sure the baud rate selected here matches the baud rate defined at the clock. The default is **19200**.
Phone Number	Enter the phone number the PC modem must dial to communicate with this clock. The number must be entered in the following format: **Outside Line Access Code, Wait Symbol, Area Code, Phone Number** If no outside line is required (such as 9), simply enter the phone number. Omit the area code if not applicable. On most modems, the wait symbol is a comma (,) typically representing a one second pause. Multiple wait symbols can be used if necessary.

Setting	Definition
Start/Stop Answer	These fields control the time of day the clock's internal modem will answer an incoming call. Enter the modem's start and stop answer time in military format (HH:MM). For example, to set the modem to answer only between 7:00 A.M. and 6:00 P.M., enter **07:00** and **18:00** in the fields provided. The default is **00:00** (midnight) and **23:59** (one minute before midnight). In other words, the modem will answer any time it is called during the day.
Ring Delay	Enter the number of rings that the clock should wait before picking up the line. For example, setting the **Ring Delay** to **4** means that after the clock detects a ringing phone; it will wait 4 rings before answering. **0** means DO NOT ANSWER.
Number of Retries	Enter the number of times the computer should attempt to connect to the clock if communication either fails or is interrupted during polling.
Time Difference Between Computer and Clock	Enter the time difference (in hours) between the computer and time clock. Since the computer can set the clock's time, this field compensates for time zone differences between the computer's location and the clock's location. When the clock's time is set, the system either adds or subtracts this time difference from the computer's clock. A setting of **0** indicates that the clock and computer are in the same time zone.
Division	Select the company division where the clock is located. Every transaction entered on this clock is tagged with this division code.
Supervisor	These options define supervisor settings for the clock.
Default Date	Check this box to automatically use the clock's current date for transactions added using a supervisor's badge. When this check box is clear, the clock prompts the supervisor for the date of any new transactions.
Default Time	Check this box to automatically use the clock's current time for transactions added using a supervisor's badge. When this check box is clear, the clock prompts the supervisor for the time of any new transactions.
Input	These settings determine how data can be entered into the clock.
Initial Source	Check the applicable check box(es) to indicate the method by which an *employee* badge number is entered into the clock.

Setting	Definition
Swipe	The employee's badge number can be entered by swiping a badge.
Key	The employee's badge number can be entered by pressing keys on the clock keypad.
Bar Code	The employee's badge number can be entered by scanning a bar code.
Employee Badge Source By Supervisor	Check the applicable check box(es) to indicate the method by which a *supervisor* (in supervisor mode) can enter employee badge number into the clock.
Swipe	The employee's badge number can be entered by swiping a badge.
Key	The employee's badge number can be entered by pressing keys on the clock keypad.
Bar Code	The employee's badge number can be entered by scanning a bar code. Must also select the type of Bar Code badge.

3. The *Configure* tab defines the message and timeout settings and contains the following information:

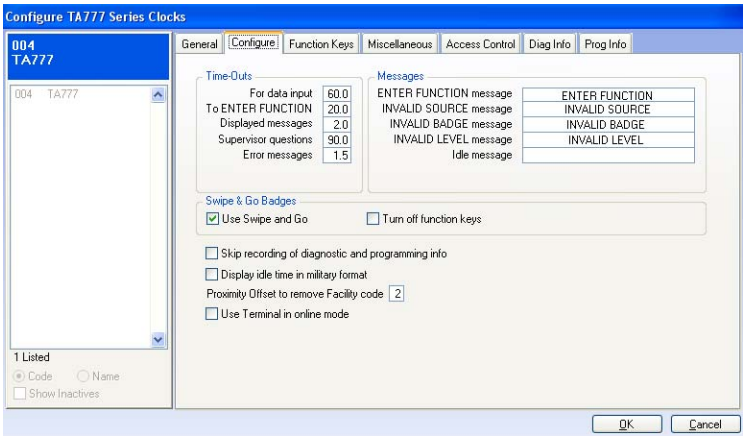


Figure 287: Configure TA715/TA777/TA780 Clocks: Configure Tab

Setting	Definition
Time-Outs	These settings determine how long prompts and messages will appear on the clock's screen.
For data input	Enter the length of time (from **0.1** to **99.9** seconds) the clock will wait for a response to a prompt before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **10.0** means that the clock will wait 10 seconds for a response after prompting for input. The default is **60.0** seconds

Setting	Definition
To Enter function	Enter the length of time (from **0.1** to **99.9** seconds) the clock will wait for a response to enter a function before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **5.5** means that the clock will wait 5½ seconds for a response after prompting for input. The default is **20.0** seconds.
Displayed messages	Enter the length of time (from **0.1** to **99.9** seconds) the clock will display any message before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **1.5** means that the clock will display messages for 1½ seconds. The default is **2.0** seconds.
Supervisor questions	Enter the length of time (from **0.1** to **99.9** seconds) the clock will wait for a response to a supervisor question before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **30.0** means that the clock will wait 30 seconds for a supervisor's response to a question such as "Employee Badge #". The default is **90.0** seconds
Error messages	Enter the length of time (from **0.1** to **99.9** seconds) the clock will display any error message before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **1.0** means that the clock will display error messages for one second. The default is **1.5** seconds.
Messages	These settings define the text prompts for certain operations at the clock.
Enter Function	This field allows you to replace the default ENTER FUNCTION message with a custom message (up to 16 characters in length). This message is displayed after swiping a badge or entering a badge number at the clock.
Invalid Source	This field allows you to replace the standard INVALID SOURCE message with a custom message (up to 16 characters in length). This message will display when an input source is used that the terminal has been programmed to ignore. For example, the employee uses a magnetic strip badge to punch In when only keypad entry is recognized.

Setting	Definition
Invalid Badge	This field allows you to replace the standard INVALID BADGE message with a custom message (up to 16 characters in length). An INVALID BADGE message displays when a badge or card other than the specified badge length is used.
Invalid Level	This field allows you to replace the default INVALID LEVEL message with a custom message. This message is displayed when Validation is used, and an invalid level number is entered. It cannot be more than 16 characters.
Idle Message	Enter the message text that displays on the time clock when in an idle state. If this field is left blank, no message will be displayed. The idle message will hold up to 16 characters.
Use Swipe & Go	Select this feature to activate swipe and go in the clock. **NOTE**: The Swipe & Go feature is enabled in the Main Company configuration screen. See ***Main Company***, page 28.
Turn off function keys	Select this feature if the clock will only be used as Swipe & Go. This feature disables all function key access at the clock.
Skip recording of diagnostic and programming info	Check this box to skip recording the Diagnostic and Programming information that display on the *Diag Info* and *Prog Info* tabs. These two files are created and written to each time a clock is communicated with and programmed using Genesis Pro. This information is used for troubleshooting communication problems. These files slow the polling process down, although not noticeably, and can be turned off by checking the box. **NOTE**: Turning off these files will make it difficult to troubleshoot certain communication problems.
Display idle time in military format	Click this check box to display the clock's idle time in military format (i.e. a 24-hour format). Clear this box to display the clock's idle time in standard format (i.e. a 12-hour clock). In both cases, the time is displayed using the HH:MM:SS format.
Proximity Offset to remove Facility code	Enter the number of characters defining the Facility code the proximity badge should not read. *This feature is only available in the TA777 and TA780.*

Setting	Definition
Use Terminal in online mode	This feature will allow the terminal to send transactions to a specified server working as a service. **NOTE:** The service must be activated to accept such transactions.

4. The *Function Keys* tab allows you customize the clock's keypad. As customizing the keypad can be an extensive process, a section of this manual has been dedicated to it. See ***Customizing Function Keys***, page 370. This section merely describes the contents of the screen.

   The tab contains the following information:

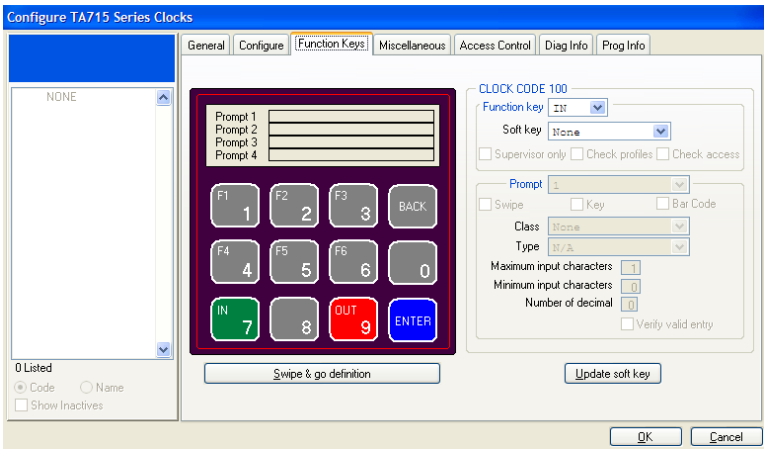


Figure 288: Configure TA715 Clock: Function Keys tab

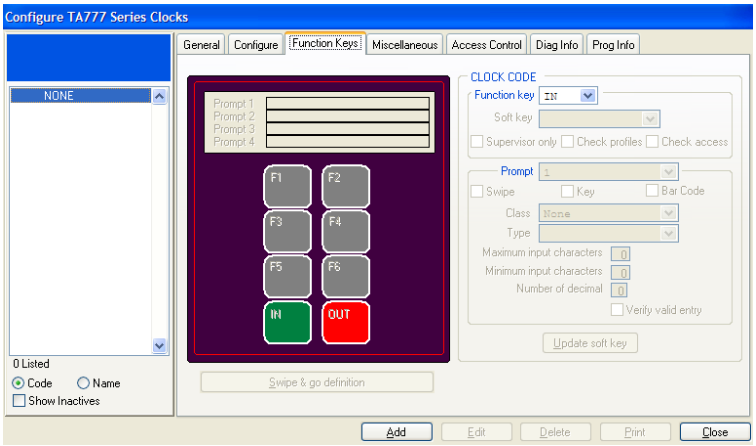


Figure 289: Configure TA777 Clock: Function Keys tab

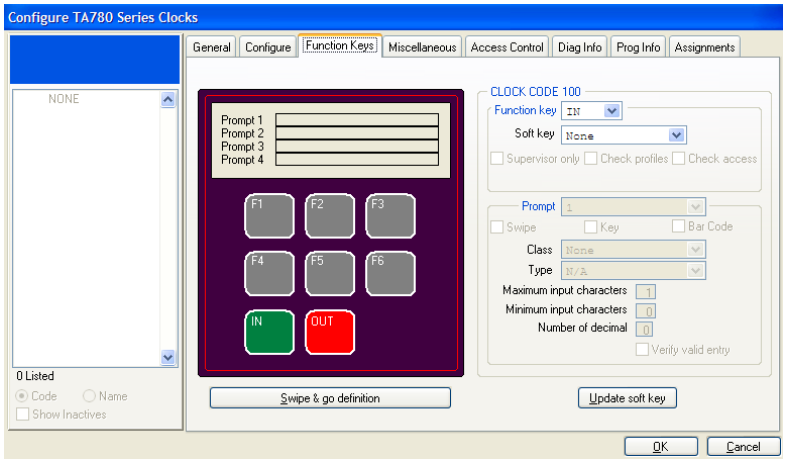


Figure 290: Configure TA780 Clock: Function Keys tab

Setting	Definition
Clock Code	Displays the unique ID code assigned to this clock.
Function Key	Displays the function key number of the key selected on the keypad graphic to the left.
Soft Key	Displays the software function currently assigned to the selected key. See page 371 for a description of the functions available.
Supervisor only	Check this box to allow only supervisor access to this function key. (Supervisor access is gained by swiping a supervisor badge in the clock.) This is used for function keys that collect data or change employee assignments, such as Group Transfer or Category Entry. Clearing this box permits any employee to access this function key.

Setting	Definition
Check Profiles	Check this box to enforce Profile Lockouts. This option is only used when the optional Access Control and Profile Lockout module is installed. Checking this box means that when an employee swipes a badge and presses this function key, the clock will check the Profile information to make sure the employee is allowed to use clock during this time. If the box is unchecked, the Profile table will not be accessed to verify the information. **NOTE**: The Profile Access Module needs to be installed, and a Profile needs to be assigned to the clock, before this checkbox is available. This option will work only after a Profile is setup, assigned to the correct employees, and assigned to the clock. The clock needs to be polled with the Program clocks and Load Profile Tables options checked.
Check Access	Check this box to enforce Profile Access. Access is used to open doors or other electric lock type enclosures. If a valid badge is used, the door will open. When used in conjunction with Profiles, Profiles will take over the verification process. If the employee is confirmed to be able to use this function key at this time, the door will open. **NOTE**: The Profile Access Module needs to be installed, and Access must be defined for the terminal, before this checkbox is available.
Prompt	Displays the prompt associated with the function key. The prompts themselves are entered in the Prompt area in the upper left corner of the keypad display. Up to four prompts are available. For more information on creating custom prompts, see page 371.
Swipe	Check this box to indicate that employees must swipe a magnetic badge to enter the information requested by the prompt. **Example:** Enter Department
Key	Check this box to indicate that employees may key the information requested by the prompt. **Example:** Enter Tips
Bar Code	Check this box to indicate that employees may input a bar code to enter the information requested by the prompt. **Example:** Enter Job

Setting	Definition
Class	The Class defines the information being entered, for reporting. For example, is it a department number, tips, etc.? Class choices cannot be added. If None is chosen, the Type setting will not be available. See page 372 for a description of the classes available.
Type	Select the data Type for the information being entered. The settings in Company Defaults of Main company determine which Type options are available for each Class. The options are: **Alphabetic**: Clock will accept letters only for this entry. **Numeric**: Clock will accept numbers only for this entry. **Alphanumeric**: Clock will accept both numbers and letters. **Number with forced decimal places**: Clock will accept numbers only and will automatically place the last two numbers entered behind the decimal place. (For example, if 1499 is entered, the clock will format it as 14.99). **Alphanumeric – hidden entry**: Clock will accept letters only; the letters will not display on the clock's screen. **Number – hidden entry** Clock will accept numbers only; the numbers will not display on the clock's screen.
Maximum Input Characters	Enter the maximum total number of characters that can be entered for this Prompt. The number displayed in this field is based on the Class selected.
Minimum Input Characters	Enter the minimum number of characters that can be entered for this Prompt. The default value for this field is 1, but may be changed.
Number of Decimal	Enter the number of places after the decimal point for a numeric entry. A maximum of **4** decimal places may be entered. This field will only be available if a Numeric option was chosen in the Class field.

Setting	Definition
Verify valid entry	Check this box to enforce the Validation available with the Job Cost/Validation Module. Validation must be turned on for each level, Download Names must be checked under the miscellaneous tab, and Load Level Validation must be checked as a polling option. The clock will check the input information against the downloaded level information. If the level entry does not exist at the time of the last programming, the data will be considered invalid.
Update Soft Key	Click this button to commit the changes made to a key's functions or settings.
Swipe and Go Definition	Click this button to display the Swipe and Go function, since there is no actual Swipe and Go function key. Swipe and Go occurs when an employee swipes a card through the clock, and is not asked to enter a function. Selecting Swipe on the Function Key dropdown menu provides the same information. The Swipe and Go function will work with all methods of punching, as long as it is activated under Configure Main Company. (See ***Main Company***, page 28).

5. The *Miscellaneous* tab defines clock defaults and contains the following information:

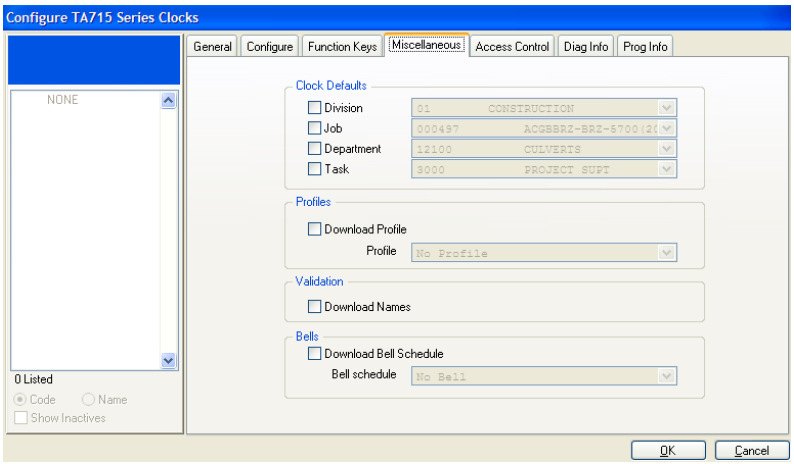


Figure 291: Configure TA715/TA777/TA780 Clocks: Miscellaneous tab

Setting	Definition
Clock Defaults	Used with the “Level change to clock default” function key. This will transfer an employee to levels that have been assigned to the clock. **NOTE:** This is part of the Job Costing module.
Department	Select the default Department for this clock.

Setting	Definition
Job	Select the default Job for this clock, if applicable.
Step	Select the default Step for this clock, if applicable.
Operation	Select the default Operation for this clock, if applicable.
Download Profile	Check this box to have the Profile assigned to this clock download to the clock. Assign the Profile from the Profile box below. This must be done to cause Profile Lockouts to take effect. **NOTE:** The Profile Access must be turned on.
Profile	Select the profile to be assigned to this clock. You must check the Download Profile box in order to make sure that the Profile is enforced at the clock.
Validation: Download Names	Check this box to download valid Department, Job, Step and Operation names to the clock. This option is only available with the Job Costing/Validation module. **NOTE**: Load Level Validation also needs to be checked in the Polling Options for the clock for this setting to take effect.
Download Bell Schedule	Check this box to download a pre-defined Bell Schedule to this clock. This option is only available with the Bell Schedule module.
Bell Schedule	Select the pre-defined Bell Schedule you wish to assign to this clock.

6. Access Control allows the clock to control who can enter a building and when. The clock can be Access Only, or it can accept Time and Attendance punches as well.

   NOTE: These settings are only available with the Access Control module.

   The *Access Control* tab defines the building access settings and contains the following information:

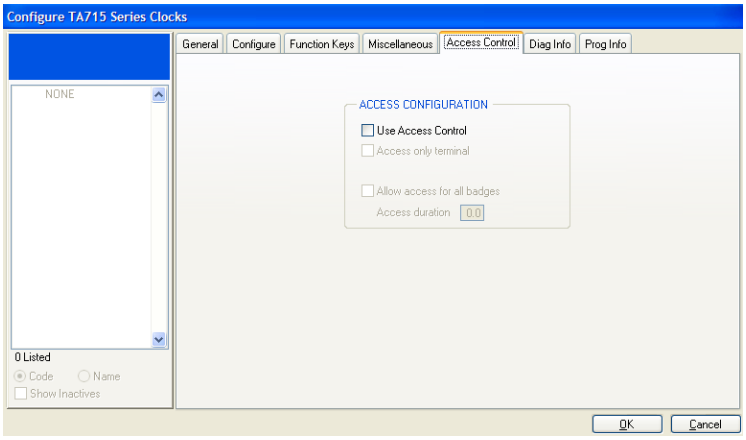


Figure 292: Configure TA715/TA777/TA780 Clocks: Access Control tab

Setting	Definition
Use Access Control	Check this box to configure Access Control for this clock.
Access only terminal	Check this box to use this clock for building access only. The clock will not record time punches such as Clock In, Start Lunch, etc.
Allow access for all badges	Check this option only when Access is being used in conjunction with Profiles. If Profiles have **not** been downloaded to the clock, and this option is checked, **any** badge of the correct length will cause the clock to grant access (open the door).
Access duration	Enter the length of time, in seconds that the Access relay will keep the door open.

7. The *Diag Info* tab contains the communication information between the computer and the clock after each attempt to communicate.

   NOTE: This tab will be blank if the clock has not been communicated with yet, or if the ***Skip recording of diagnostic and programming info*** option is checked.

8. The *Prog Info* tab contains the information that was sent to the clock after any type of programming.

   NOTE: This tab will be blank if the clock has not been communicated with yet, or if the ***Skip recording of diagnostic and programming info*** option is checked.

9. **NOTE:** This tab will only apply to **TA780 Clocks** using the **fingerprint** option.

   The *Assignments* tab lists the employees that can use this clock. This is only necessary if you are using fingerprints with TA780 clocks.

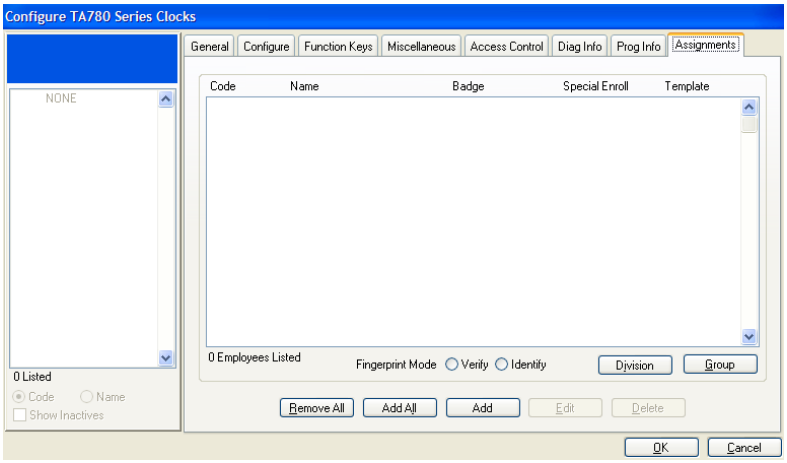


Figure 293: Configure TA780 Clocks: Assignments tab

The tab contains the following information:

Setting	Definition

Setting	Definition
Employee Listing	Displays a list of the employees that can use this clock. Includes: employee code, employee name, employee badge number, special enrollment and if they have a fingerprint template saved. **NOTE**: Can use the Print feature to print an assignment listing.
Fingerprint Mode	**Verify:** This option will only verify employee number with fingerprint. **Identify:** This option will identify employee from the fingerprint only.
Division	Click this button to select employees based on Division. Employees selected are assigned the default Authority and Verification automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another ***Authority and Verification.***
Group	Click this button to select employees based on Group. Employees selected are assigned the default Authority and Verification automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another ***Authority and Verification.***
Remove All	Click this button to remove all employees currently assigned to the clock.
Add All	Click this button to assign all employees to the clock. Employees selected are assigned the default Authority and Verification automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another ***Authority and Verification***.
Add	Click this button to select employees individually. You will be prompted to select the following: **Authority**: The Authority Level defines which clock menus employee can view or use at the clock. The following options are available: Employee, Supervisor or Configuration. **Verification:** The Verification Level defines the false read threshold.

PC Clock

Configuration of the PC Clock is done under the TA600 Series time clock. The PC Clock can use **Profile Lockouts** and **Messaging**.

Since multiple clocks can be defined in the Genesis Pro, a copy feature is available to copy an existing clock's parameters when adding a new clock. This eliminates the need to re-enter an entirely new clock configuration.

Configure a PC Clock

1. Click the **Clocks** menu**, Configure, TA600**. The *Configure Clock* dialog box will open. The dialog box contains several tabs, all of which are described below.

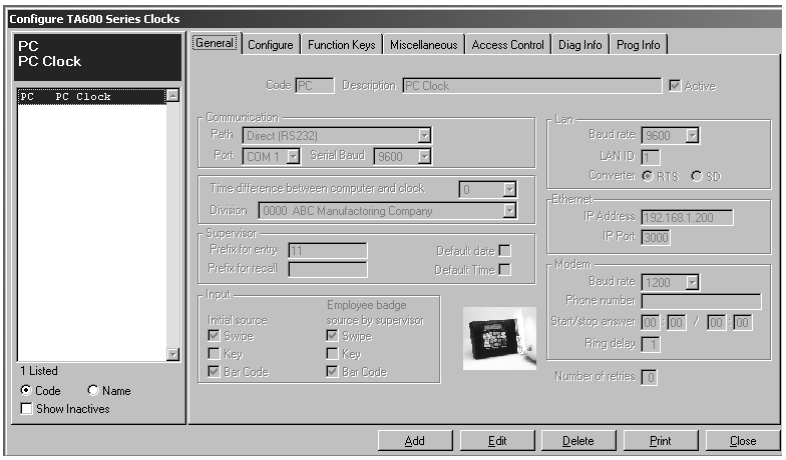


Figure 294: Configure PC Clocks: General Tab

2. The *General* tab defines the communication and general operation settings and contains the following information:

Setting	Definition
Code	This is a required field. Enter PC for this code.
Description	In this field enter PC Clock for the description.
Active	Click the Active check box to indicate that the clock is currently in use. Uncheck this box if the clock is not being used at this time.
Initial Source	Check the applicable check box(es) to indicate the method by which an *employee* badge number is entered into the clock.
Swipe	Swiping a badge can enter the employee's badge number.
Key	Pressing keys on the clock keypad can enter the employee's badge number.
Bar Code	Scanning a bar code can enter the employee's badge number.

3. The *Configure* tab defines the message and timeout settings and contains the following information:

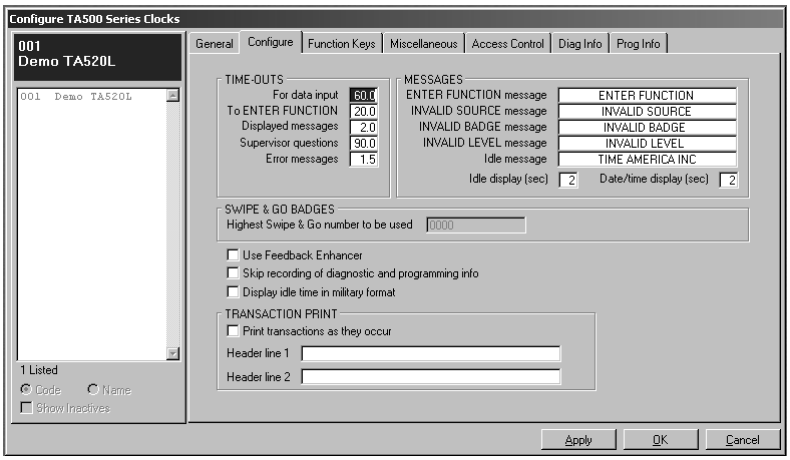


Figure 295: Configure PC Clock: Configure Tab

Setting	Definition
Time-Outs	These settings determine how long prompts and messages will appear on the clock's screen.
For data input	Enter the length of time (from **0.1** to **99.9** seconds) the clock will wait for a response to a prompt before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **10.0** means that the clock will wait 10 seconds for a response after prompting for input. The default is **60.0** seconds
To Enter function	Enter the length of time (from **0.1** to **99.9** seconds) the clock will wait for a response to enter a function before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **5.5** means that the clock will wait 5½ seconds for a response after prompting for input. The default is **20.0** seconds.
Displayed messages	Enter the length of time (from **0.1** to **99.9** seconds) the clock will display any message before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **1.5** means that the clock will display messages for 1½ seconds. The default is **2.0** seconds.

Setting	Definition
Supervisor questions	Enter the length of time (from **0.1** to **99.9** seconds) the clock will wait for a response to a supervisor question before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **30.0** means that the clock will wait 30 seconds for a supervisor's response to a question such as "Employee Badge #". The default is **90.0** seconds
Error messages	Enter the length of time (from **0.1** to **99.9** seconds) the clock will display any error message before returning to an idle state. Time is entered in seconds and tenths of a second. For example, **1.0** means that the clock will display error messages for one second. The default is **1.5** seconds.
Messages	These settings define the text prompts for certain operations at the clock.
Enter Function	This field allows you to replace the default ENTER FUNCTION message with a custom message (up to 16 characters in length). This message is displayed after swiping a badge or entering a badge number at the clock.
Invalid Source	This field allows you to replace the standard INVALID SOURCE message with a custom message (up to 16 characters in length). This message will display when an input source is used that the terminal has been programmed to ignore. For example, the employee uses a magnetic strip badge to punch In when only keypad entry is recognized.
Invalid Badge	This field allows you to replace the standard INVALID BADGE message with a custom message (up to 16 characters in length). An INVALID BADGE message displays when a badge or card other than the specified badge length is used.
Invalid Level	This field allows you to replace the default INVALID LEVEL message with a custom message. This message is displayed when Validation is used, and an invalid level number is entered. It cannot be more than 16 characters.

Setting	Definition
Idle Message	Enter the message text that displays on the time clock when in an idle state. If this field is left blank, no message will be displayed. The idle message will hold up to 16 characters.
Idle Display (sec)	Enter the length of time (from **1** to **60** seconds) that the idle message displays before switching to the date and time. The default is **2**. **0** indicates the idle message should not display.
Date/Time display (sec)	Enter the length of time (from **1** to **60** seconds) that the Date and time display before switching back to the idle message. The default is **2**. **0** indicates the date and time should not display.
Swipe & Go Badges	If the Swipe & Go feature is used enter the highest badge number that the terminal will recognize as a Swipe & Go badge. For example, if **2000** is entered here, only badge numbers 0001 through 2000 are considered Swipe & Go badges. All badge numbers above 2000 are treated as "normal" badges requiring the employee to enter a function key to complete the transaction (Clock In or Out, Out to Lunch, In from Lunch, etc.). **NOTE**: The Swipe & Go feature is enabled in the Main Company configuration screen. See ***Main Company***, page 28.

4. The *Function Keys* tab allows you customize the clock's keypad. As customizing the keypad can be an extensive process, a section of this manual has been dedicated to it. See ***Customizing Function Keys***, page 370. This section merely describes the contents of the screen.

   The tab contains the following information:

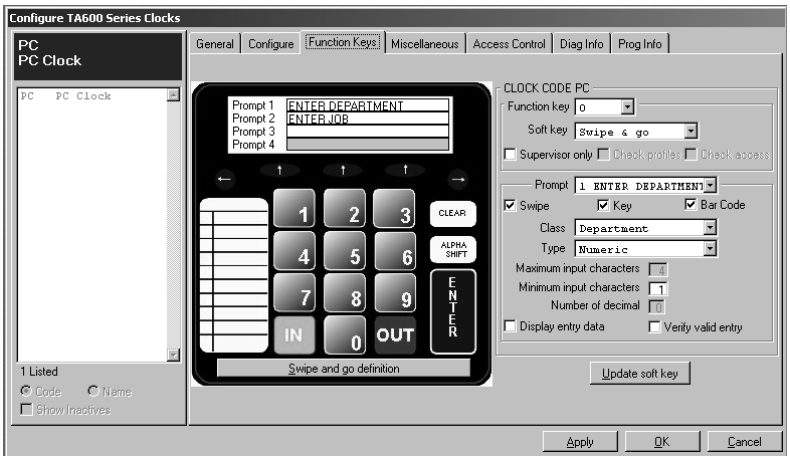


Figure 296: Configure PC Clock: Function Keys tab

Setting	Definition
Clock Code	Displays the unique ID code assigned to this clock.
Function Key	Displays the function key number of the key selected on the keypad graphic to the left.
Soft Key	Displays the software function currently assigned to the selected key. See page 371 for a description of the functions available.
Prompt	Displays the prompt associated with the function key. The prompts themselves are entered in the Prompt area in the upper left corner of the keypad display. Up to four prompts are available. For more information on creating custom prompts, see page 371.
Swipe	Check this box to indicate that employees must swipe a magnetic badge to enter the information requested by the prompt. **Example:** Enter Department
Key	Check this box to indicate that employees may key the information requested by the prompt. **Example:** Enter Tips
Bar Code	Check this box to indicate that employees must swiped a bar code to enter the information requested by the prompt. **Example:** Enter Job
Class	The Class defines the information being entered, for reporting. For example, is it a department number, tips, etc.? Class choices cannot be added. If None is chosen, the Type setting will not be available. See page 372 for a description of the classes available.

Setting	Definition
Type	Select the data Type for the information being entered. The settings in Company Defaults of Main company determine which Type options are available for each Class. The options are: **Alphabetic**: Clock will accept letters only for this entry. **Numeric**: Clock will accept numbers only for this entry. **Alphanumeric**: Clock will accept both numbers and letters. **Number with forced decimal places**: Clock will accept numbers only and will automatically place the last two numbers entered behind the decimal place. (For example, if 1499 is entered, the clock will format it as 14.99). **Alphanumeric – hidden entry**: Clock will accept letters only; the letters will not display on the clock's screen. **Number – hidden entry** Clock will accept numbers only; the numbers will not display on the clock's screen.
Maximum Input Characters	Enter the maximum total number of characters that can be entered for this Prompt. The number displayed in this field is based on the Class selected.
Minimum Input Characters	Enter the minimum number of characters that can be entered for this Prompt. The default value for this field is 1, but may be changed.
Number of Decimal	Enter the number of places after the decimal point for a numeric entry. A maximum of **4** decimal places may be entered. This field will only be available if a Numeric option was chosen in the Class field.
Display Entry data	Check this box to display the input information.
Verify valid entry	Check this box to enforce the Validation available with the Job Cost/Validation Module. Validation must be turned on for each level, Download Names must be checked under the miscellaneous tab, and Load Level Validation must be checked as a polling option. The clock will check the input information against the downloaded level information. If the level entry does not exist at the time of the last programming, the data will be considered invalid.
Update Soft Key	Click this button to commit the changes made to a key's functions or settings.

Setting	Definition
Swipe and Go Definition	Click this button to display the Swipe and Go function, since there is no actual Swipe and Go function key. Swipe and Go occurs when an employee swipes a card through the clock, and is not asked to enter a function. Selecting Swipe on the Function Key dropdown menu provides the same information. The Swipe and Go function will work with all methods of punching, as long as it is activated under Configure Main Company. (See ***Main Company***, page 28).

WebClock

Configuration of the WebClock is done under the TA600 Series time clock.

Since multiple clocks can be defined in the Genesis Pro, a copy feature is available to copy an existing clock's parameters when adding a new clock. This eliminates the need to re-enter an entirely new clock configuration.

NOTE: The TimeSheet Submittal portion of WebClock only permits up to 3 levels of Job Costing to be entered or transferred.

Configure a WebClock

1. Click the **Clocks** menu**, Configure, TA600**. The *Configure Clock* dialog box will open.

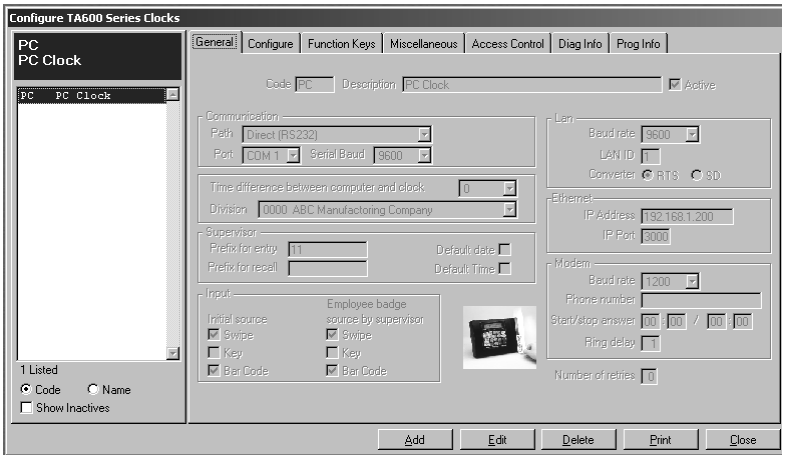


Figure 297: Configure WebClock Clocks: General Tab

2. The dialog box contains several tabs, all of which are described below. The *General* tab defines the communication and general operation settings and contains the following information:

Setting	Definition
Code	This is a required field. Enter WEB and a number for this code. For example: WEB1 or WEB2

Setting	Definition
Description	In this field enter the name of the WebClock for the description.
Active	Click the Active check box to indicate that the clock is currently in use. Uncheck this box if the clock is not being used at this time.

3. The *Configure* tab defines the message and timeout settings and contains the following information:

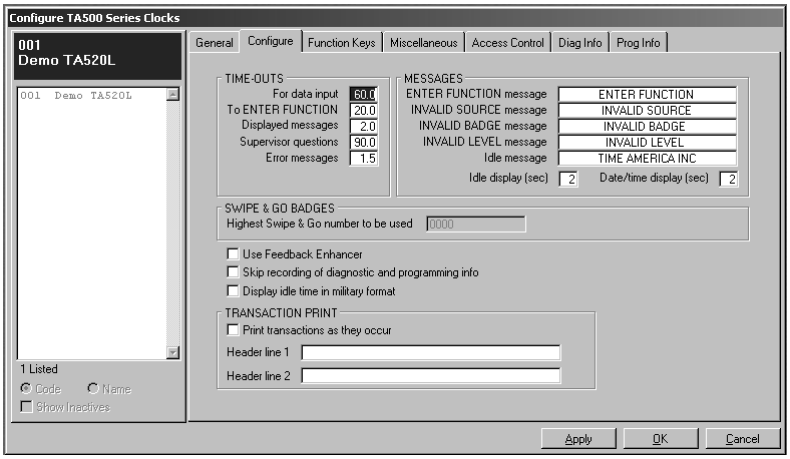


Figure 298: Configure WebClock Clock: Configure Tab

Setting	Definition
Idle Message	Enter the message text that displays on the time clock when in an idle state. If this field is left blank, no message will be displayed. The idle message will hold up to 16 characters.

4. The *Function Keys* tab allows you customize the clock's keypad. As customizing the keypad can be an extensive process, a section of this manual has been dedicated to it. See ***Customizing Function Keys***, page 370. This section merely describes the contents of the screen.

   The tab contains the following information:

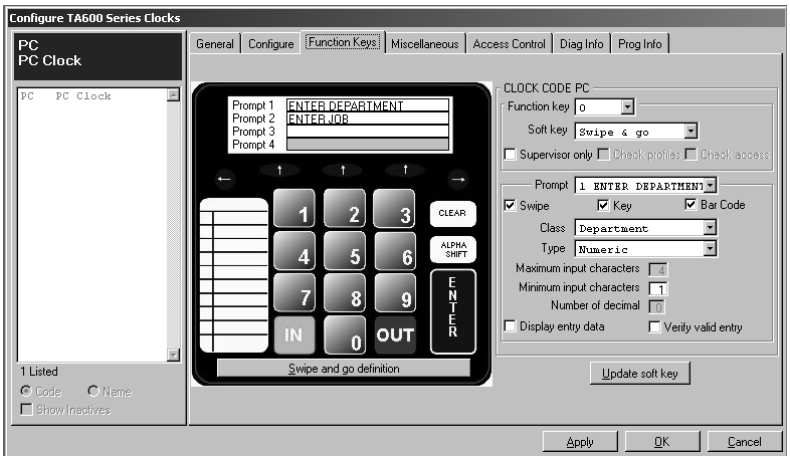


Figure 299: Configure WebClock: Function Keys tab

Setting	Definition
Clock Code	Displays the unique ID code assigned to this clock.
Function Key	Displays the function key number of the key selected on the keypad graphic to the left.
Soft Key	Displays the software function currently assigned to the selected key. See page 371 for a description of the functions available.
Prompt	Displays the prompt associated with the function key. The prompts themselves are entered in the Prompt area in the upper left corner of the keypad display. Up to four prompts are available. For more information on creating custom prompts, see page 371.
Key	Check this box to indicate that employees may key the information requested by the prompt. **Example:** Enter Tips
Class	The Class defines the information being entered, for reporting. For example, is it a department number, tips, etc.? Class choices cannot be added. If None is chosen, the Type setting will not be available. See page 372 for a description of the classes available.

Setting	Definition
Type	Select the data Type for the information being entered. The settings in Company Defaults of Main company determine which Type options are available for each Class. The options are: **Alphabetic**: Clock will accept letters only for this entry. **Numeric**: Clock will accept numbers only for this entry. **Alphanumeric**: Clock will accept both numbers and letters. **Number with forced decimal places**: Clock will accept numbers only and will automatically place the last two numbers entered behind the decimal place. (For example, if 1499 is entered, the clock will format it as 14.99). **Alphanumeric – hidden entry**: Clock will accept letters only; the letters will not display on the clock's screen. **Number – hidden entry** Clock will accept numbers only; the numbers will not display on the clock's screen.
Maximum Input Characters	Enter the maximum total number of characters that can be entered for this Prompt. The number displayed in this field is based on the Class selected.
Minimum Input Characters	Enter the minimum number of characters that can be entered for this Prompt. The default value for this field is 1, but may be changed.
Number of Decimal	Enter the number of places after the decimal point for a numeric entry. A maximum of **4** decimal places may be entered. This field will only be available if a Numeric option was chosen in the Class field.
Display Entry data	Check this box to display the input information.
Verify valid entry	Check this box to enforce the Validation available with the Job Cost/Validation Module. Validation must be turned on for each level, Download Names must be checked under the miscellaneous tab, and Load Level Validation must be checked as a polling option. The clock will check the input information against the downloaded level information. If the level entry does not exist at the time of the last programming, the data will be considered invalid.

Setting	Definition
Update Soft Key	Click this button to commit the changes made to a key's functions or settings.

Configuring TimeSheet Submittal

Configuring a TimeSheet Submittal MUST be done to use the TimeSheet Submittal feature in WebClock. The configuration is done under the TA600 Series time clock.

Since multiple clocks can be defined in the Genesis Pro, a copy feature is available to copy an existing clock's parameters when adding a new clock. This eliminates the need to re-enter an entirely new clock configuration.

NOTE: The TimeSheet Submittal portion of WebClock only permits up to 3 levels of Job Costing to be entered or transferred.

1. Click the **Clocks** menu**, Configure, TA600**. The *Configure Clock* dialog box will open.

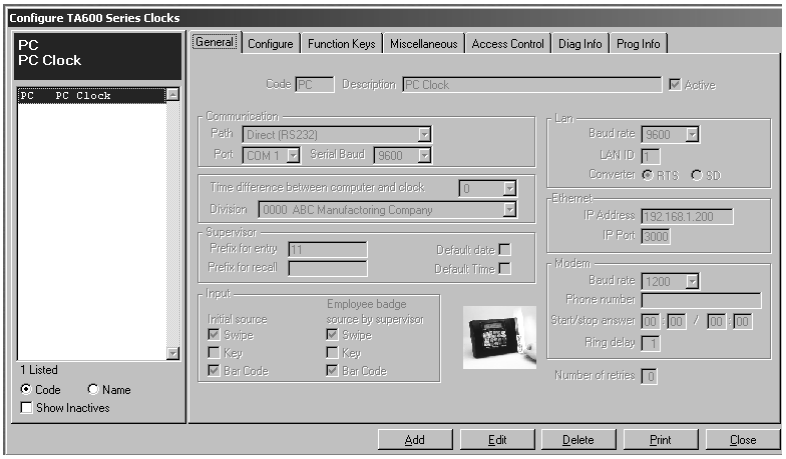


Figure 300: Configure WebClock Clocks: General Tab

2. The dialog box contains several tabs, all of which are described below. The *General* tab defines the communication and general operation settings and contains the following information:

Setting	Definition
Code	This is a required field. Enter TIME for this code.
Description	In this field enter the name TimeSheet Submittal for the description.
Active	Click the Active check box to indicate that the clock is currently in use. Uncheck this box if the clock is not being used at this time.

3. The *Configure* tab does not need to be configured.
4. The *Function Keys* tab allows you customize the clock's keypad.

When the WebClock should accept Job Costing information in the TimeSheet Submittal process you must configure the “In” key and the “0” key with the same Job Costing information.

For example:

The “In” key’s “soft key” should read “Clocked In” and the Prompts to follow should be “Clocked In” and the appropriate Job Costing information you wish to collect.

The “0” key’s “soft key” should read “Change” and the Job Costing information should be duplicated from the prompts listed ***under*** the “In” key’s first prompt, “Clocked In.”

As customizing the keypad can be an extensive process, a section of this manual has been dedicated to it. See ***Customizing Function Keys***, page 370. This section merely describes the contents of the screen.

The tab contains the following information:

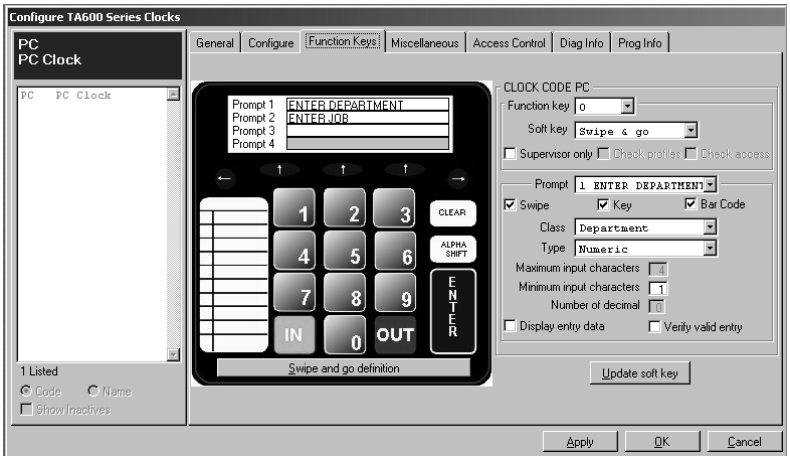


Figure 301: Configure WebClock: Function Keys tab

Setting	Definition
Clock Code	Displays the unique ID code assigned to this clock.
Function Key	Displays the function key number of the key selected on the keypad graphic to the left.
Soft Key	Displays the software function currently assigned to the selected key. See page 371 for a description of the functions available.
Prompt	Displays the prompt associated with the function key. The prompts themselves are entered in the Prompt area in the upper left corner of the keypad display. Up to four prompts are available. For more information on creating custom prompts, see page 371.

Setting	Definition
Key	Check this box to indicate that employees may key the information requested by the prompt. **Example:** Enter Tips
Class	The Class defines the information being entered, for reporting. For example, is it a department number, tips, etc.? Class choices cannot be added. If None is chosen, the Type setting will not be available. See page 372 for a description of the classes available.
Type	Select the data Type for the information being entered. The settings in Company Defaults of Main company determine which Type options are available for each Class. The options are: **Alphabetic**: Clock will accept letters only for this entry. **Numeric**: Clock will accept numbers only for this entry. **Alphanumeric**: Clock will accept both numbers and letters. **Number with forced decimal places**: Clock will accept numbers only and will automatically place the last two numbers entered behind the decimal place. (For example, if 1499 is entered, the clock will format it as 14.99). **Alphanumeric – hidden entry**: Clock will accept letters only; the letters will not display on the clock's screen. **Number – hidden entry** Clock will accept numbers only; the numbers will not display on the clock's screen.
Maximum Input Characters	Enter the maximum total number of characters that can be entered for this Prompt. The number displayed in this field is based on the Class selected.
Minimum Input Characters	Enter the minimum number of characters that can be entered for this Prompt. The default value for this field is 1, but may be changed.
Number of Decimal	Enter the number of places after the decimal point for a numeric entry. A maximum of **4** decimal places may be entered. This field will only be available if a Numeric option was chosen in the Class field.
Display Entry data	Check this box to display the input information.

Setting	Definition
Verify valid entry	Check this box to enforce the Validation available with the Job Cost/Validation Module. Validation must be turned on for each level, Download Names must be checked under the miscellaneous tab, and Load Level Validation must be checked as a polling option. The clock will check the input information against the downloaded level information. If the level entry does not exist at the time of the last programming, the data will be considered invalid.
Update Soft Key	Click this button to commit the changes made to a key's functions or settings.

TASC

The TASC terminal is similar to the TA500 and TA600 Series in that it collects punches and transmits them to the software via the polling process. However, TASC is a stand-alone time clock. This means that it does not require a PC to calculate and record employee's time.

TASC is perfect for situations in which a remote site performs its own transaction editing, while payroll and other functions are processed at a central location. The remote site can print transactions from the clock locally; the central location can connect to clock only when it needs to retrieve data to process data and run reports.

Since TASC are "stand-alone" clocks, they will not receive Policy and employee information in the same way that other clocks do. As part of the configuration of the clock, you will define the rounding, lockout, and overtime policies, as well as list which employees may use this clock. This information is then programmed into the clock.

Configure a TASC Clock

1. Click the **Clocks** menu**, Configure, TASC**. The *Configure Clock* dialog box will open. The dialog box contains several tabs, all of which are described below.

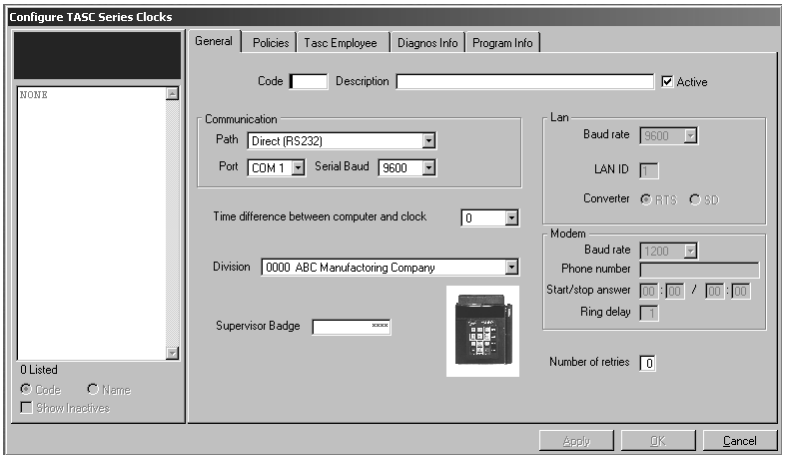


Figure 302: Configure a TASC Clock

2. The *General* tab defines the communication and general operation settings and contains the following information:

Setting	Definition
Code	This is a required field. Enter a unique code (up to 4 characters) to identify the clock. Once defined, this code cannot be changed.
Description	Enter a description of the clock. This description will be seen in the system and on reports. This field can be used to describe the clock type and it's location in your facility (i.e. TASC In BUILDING TWO). The clock description can be up to 30 characters long.

Setting	Definition
Active	Click the Active check box to indicate that the clock is currently in use. Uncheck this box if the clock is not being used at this time.
Path	Select the type of connection this clock will use. The options are: • Direct (RS232) • LAN (RS485) • Modem (Internal) • Serial LAN (Smart Converter) • Remote Direct (External Modem) • Modem LAN (Smart Converter) See ***Types of Connections***, page 304.
Port	Select the communications port on your computer that will be used to communicate with the clock. The factory default is **COM 1**
Serial Baud	This setting is for RS232 communication. The factory default is **9600**.
Lan	These settings become available when LAN has been chosen as the communication type in the Communication Path field.
Baud Rate	Select the applicable communication speed. The default is **9600** baud. Make sure the baud rate selected here matches the baud rate defined at the clock. **TIP**: You can use the Configuration Badge (000000000) at the clock to view/modify the clock's baud rate.
LAN ID	Enter the clock's unique identification number in this field. This number provides a way for the system to distinguish between individual clocks. Any one-character (alphabetic or numeric) ID may be used. Make sure the LAN ID defined here matches the LAN ID defined at the clock. **TIP**: You can use the Configuration Badge (000000000) at the clock to view/modify the clock's LAN ID.
Converter	Select the type of converter used in the LAN setup. The RTS converters have been phased out over the years and were mainly used with AT style computers that used a 25 pin serial port. Most new computers use 9 pin serial ports that connect to the newer SD style converters. If you are unsure which you have, contact your dealer.

Setting	Definition
Baud Rate	Select the modem's communication speed. The default baud rate for the TASC clock is 1200. Make sure the baud rate selected here matches the baud rate defined at the clock.
Phone Number	Enter the phone number the PC modem must dial to communicate with this clock. The number must be entered in the following format: **Outside Line Access Code, Wait Symbol, Area Code, Phone Number** If no outside line is required (such as 9), simply enter the phone number. Omit the area code if not applicable. On most modems, the wait symbol is a comma (,) typically representing a one second pause. Multiple wait symbols can be used if necessary.
Start/Stop Answer	These fields control the time of day the clock's internal modem will answer an incoming call. Enter the modem's start and stop answer time in military format (HH:MM). For example, to set the modem to answer only between 7:00 A.M. and 6:00 P.M., enter **07:00** and **18:00** in the fields provided. The default is **00:00** (midnight) and **23:59** (one minute before midnight). In other words, the modem will answer any time it is called during the day.
Ring Delay	Enter the number of rings that the clock should wait before picking up the line. For example, setting the **Ring Delay** to **4** means that after the clock detects a ringing phone; it will wait 4 rings before answering. **0** means DO NOT ANSWER.
Number of Retries	Enter the number of times the computer should attempt to connect to the clock if communication either fails or is interrupted during polling.
Time Difference Between Computer and Clock	Enter the time difference (in hours) between the computer and time clock. Since the computer can set the clock's time, this field compensates for time zone differences between the computer's location and the clock's location. When the clock's time is set, the system either adds or subtracts this time difference from the computer's clock. A setting of **0** indicates that the clock and computer are in the same time zone.
Division	Select the company division where the clock is located. Every transaction entered on this clock is tagged with this division code.
Supervisor Badge	Enter the badge number that activates the Supervisor mode of the clock.

3. The *Policies* tab defines the rounding lunch and break policies for the employees using this clock. These are not the same as the company policies set up under the **Configure** menu, but rather policies that are transferred to the clock when it is programmed. Up to 15 different policies can be defined for the TASC terminal. Any company policy that is not defined here is not downloaded to the TASC.

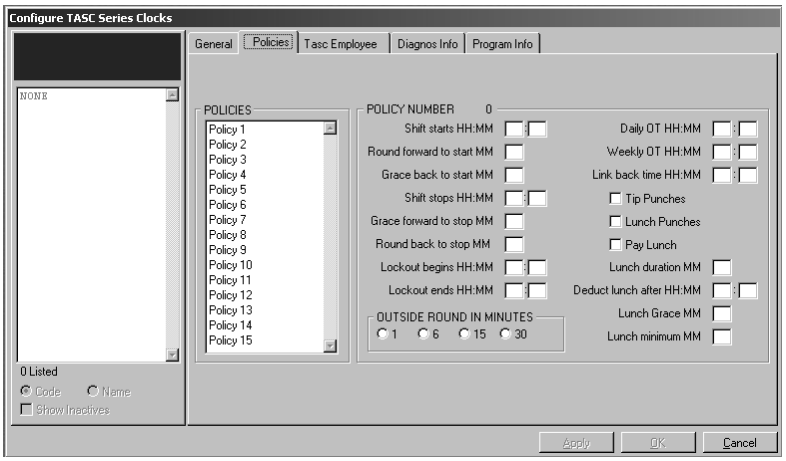


Figure 303: Configure TASC Clock: Policies tab

Setting	Definition
Policies	Displays a list of the 15 available policies. Select the policy you wish to configure.
Shift Starts HH:MM	Enter the time of day (HH:MM) the shift starts for employees. Enter the time in military format. The default is **08:00** or 8:00 A.M.
Round forward to start MM	Enter the number of minutes *before* the shift's start time that punches are rounded forward to the shift's start. A maximum of **99** minutes may be entered. The default is **30** minutes.
Grace back to start MM	Enter the number of minutes *after* the shift's start time that punches are rounded back (in grace) to the shift's start. A maximum of **99** minutes may be entered. The default is **5** minutes.
Shift Stops HH:MM	Enter the time of day (HH:MM) the shift ends for employees. Enter the time in military format. The default is **17:00** or 5:00 P.M.
Grace forward to stop MM	Enter the number of minutes *before* the shift's stop time that punches are rounded forward to the shift's stop. A maximum of **99** minutes may be entered. The default is **5** minutes.
Round back to stop MM	Enter the number of minutes *after* the shift's stop time that punches are rounded back to the shift's stop. A maximum of **99** minutes may be entered. The default is **30** minutes.

Setting	Definition
Lockout begins HH:MM	Enter the start time (HH:MM) of this policy's employee lockout. Enter the time in military format. If the lockout begin and lockout end times are **00:00**, no lockout takes place. The default is **00:00**. Any employee that enters a punch between these lockout times receives the message SEE SUPERVISOR. Only by swiping a supervisor badge can you override the lockout and accept the punch.
Lockout ends HH:MM	Enter the stop time (HH:MM) of this policy's employee lockout. Enter the time in military format. If the lockout begin and lockout end times are both **00:00**, no lockout takes place. The default is **00:00** or not used. Any employee that enters a punch between these lockout times receives the message SEE SUPERVISOR. Only by swiping a supervisor badge can you override the lockout and accept the punch.
Outside Round in Minutes	Enter the increment to which punches that fall outside of the rounding to schedule should round. For example, if **6** is selected in this field, time is rounded to the nearest 6 minutes. Punches between **0** and **3** minutes are rounded back to the last increment; punches between **4** and **6** minutes are rounded forward to the next increment. The default is **15**.
Daily OT	Enter the length of time (HH:MM) an employee has to work in one day before overtime is applied. For example, if **8:00** is entered in this field, any hours worked over 8 hours a day is counted as overtime. The default is **00:00**.
Weekly OT	Enter the length of time (HH:MM) an employee has to work in one week before overtime is applied. For example, if **40:00** is entered in this field, any hours worked over 40 hours a week is counted as overtime. The default is **40:00**.
Link back time HH:MM	Enter the maximum time (HH:MM) an employee who has punched Out can punch back In and still have the new time included in the previous total. For example, the **Link Back Time** is set to **2:00** and overtime is paid after working 8 hours in a single day. An employee punches In at 8:00 A.M. and Out at 5:00 P.M. with a one hour unpaid lunch. If the employee punches back In at 6:30 P.M. (within the 2-hour link-back time) and out at 9:30 P.M., the daily total shows 8 hours of regular time and 3 hours of overtime.
Tip Punches	Check this box to enter tips at the clock for this policy. Clear this box if no tips are entered at the clock.

Setting	Definition
Lunch Punches	Check this box to allow employees to punch In and Out for lunch. Clear this box if employees do not punch for lunches.
Pay Lunch	Check this box if employee lunches are paid. Paid lunches are not deducted from the shift's total hours. Clear this check box if employee lunches are *not* paid.
Lunch Duration MM	Enter the lunch period duration in minutes for this policy. The default is **60** minutes or one hour.
Deduct lunch after HH:MM	The lunch duration specified is automatically deducted from daily total hours after this length of time is worked. The default is **5:00**. In other words, after 5 hours of worked time, the value in **Lunch Duration** is deducted from the total hours for that day.
Lunch grace MM	Enter the number of minutes over **Lunch Duration** that is "in graced." For example, if **05** is entered here and **60** in **Lunch Duration**, any employee that punches In from Lunch within 65 minutes from punching Out, is not considered late. The default is **05** or 5 minutes.
Lunch minimum MM	Enter the minimum number of minutes an employee must take for lunch to be deducted. Punching Out for Lunch and back In within this time is not counted toward lunch. The default is **05** or 5 minutes.

4. The *TASC Employee* tab lists the employees that can use this clock and contains the following information:

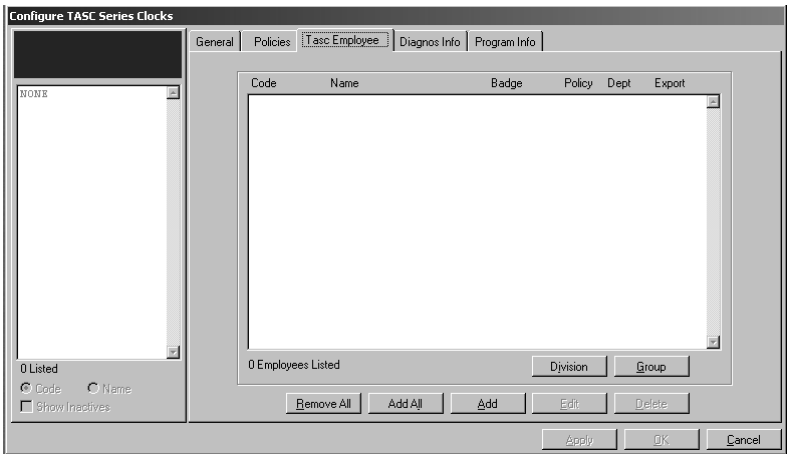


Figure 304: Configure TASC Clock: Employee tab

Setting	Definition

Setting	Definition
Employee Listing	Displays a list of the employees that can use this clock. Includes their Employee ID, Employee Name, Employee Badge, the policy the employee is assigned to, the department, and if their information will be exported to your payroll provider.
Division	Click this button to select employees based on Division. Employees selected are assigned the default Policy and Department automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another Policy or Department.
Group	Click this button to select employees based on Group. Employees selected are assigned the default Policy and Department automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another Policy or Department.
Remove All	Click this button to remove all employees currently assigned to the clock.
Add All	Click this button to assign all employees to the clock. Employees selected are assigned the default Policy and Department automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another Policy or Department.
Add	Click this button to select employees individually. You will be prompted to select the TASC Policy (as defined on the previous tab) and Department.
Edit	Click this button to edit the employee's badge number, policy or department.
Delete	Click this button to remove the employee from the list.

5. The *Diag Info* tab contains the communication information between the computer and the clock after each attempt to communicate.
6. The *Prof Info* tab contains the information that was sent to the clock after any type of programming.

ATS Series Clocks

Genesis Pro offers a module that allows it to connect to Third Party clocks such as ATS and Hand Reader. The ATS clocks are badge-swipe clocks similar to the TA500 and TA600 series.

Configure ATS Clocks

1. Click the **Clocks** menu**, Configure, ATS**. The *Configure Clocks* dialog box will open. The *Configure* dialog box contains several tabs, all of which are described below.

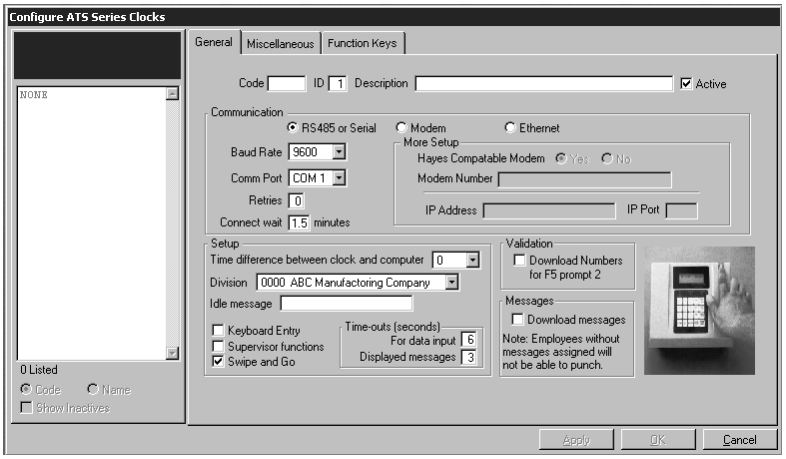


Figure 305: Configure ATS Clock

2. The *General* tab defines communication and operation settings and contains the following information:

Setting	Definition
Code	This is a required field. Enter a unique code (up to 4 characters) to identify the clock. Once defined, this code cannot be changed.
ID	Enter a unique ID number to identify the clock. This number will also be programmed into the clock.
Description	Enter a description of the clock. This description will be seen in the system and on reports. This field can be used to describe the clock type and it's location in your facility (i.e. ATS In BUILDING TWO). The clock description can be up to 30 characters long
Active	Click the Active check box to indicate that the clock is currently in use. Uncheck this box if the clock is not being used at this time.
RS485 or Serial	Select this option to choose an RS485 or RS232 connection.
Modem	Select this option to choose a modem solution.

Setting	Definition
Ethernet	Select this option to choose an Ethernet solution.
Baud Rate	Select the applicable communication speed. Make sure the baud rate selected here matches the baud rate defined at the clock. • **RS485, Serial and Ethernet**: **9600** baud • **Modem**: **2400** baud
Comm Port	Select the communications port on your computer that will be used to communicate with the clock. The factory default is **COM 1.**
Retries	Enter the number of times the computer should attempt to connect to the clock if communication either fails or is interrupted during polling.
Connect wait	The value entered into this field specifies the greatest amount of time Genesis Pro will wait before deciding the clock is unable to be reached and will time out. This value is minutes and tenths of minutes. Connect wait minutes is used solely for Ethernet communication. ATS series clocks do not respond immediately to a communication query across Ethernet communication, instead, they broadcast continuously on a 30-second cycle. Depending on the speed of the network used, the amount of time needed for the attention signal sent from Genesis Pro to reach the clock, the clock to finish its' 30 second cycle, and send a signal back, can fluctuate greatly.
Hayes compatible modem	Check whether the modem used to call the clock is Hayes Compatible. Hayes Corporation is one of the founders of modem technology and as a result some modems list themselves as Hayes Compatible. If not sure, try both configurations. Refers to modem connected to this computer. Needed only if modem communication will be used.

Setting	Definition
Modem number	Enter the phone number the PC modem must dial to communicate with this clock. The number must be entered in the following format: **Outside Line Access Code, Wait Symbol, Area Code, Phone Number** If no outside line is required (such as 9), simply enter the phone number. Omit the area code if not applicable. On most modems, the wait symbol is a comma (,) typically representing a one second pause. Multiple wait symbols can be used if necessary.
IP Address	Enter the IP address assigned to the clock.
IP Port	Displays the port used for Ethernet. The default is 2500 and should not be changed. Altering this number will result in communication failure, and the possibility of only being able to connect to the Etherlink Converter serially.
Time difference between clock and computer	Enter the time difference (in hours) between the computer and time clock. Since the computer can set the clock's time, this field compensates for time zone differences between the computer's location and the clock's location. When the clock's time is set, the system either adds or subtracts this time difference from the computer's clock. A setting of **0** indicates that the clock and computer are in the same time zone.
Division	Select the company division where the clock is located. Every transaction entered on this clock is tagged with this division code.
Idle Message	Enter the message text that displays on the time clock when in an idle state. If this field is left blank, no message will be displayed.
Keyboard entry	Check this box to allow employees to enter badge numbers and other data (such as department numbers) on the clock's keypad.
Supervisor functions	Check this box to allow supervisor functions, such as entering punches, at the clock
Swipe & Go	Check this box to make the clock Swipe & Go. The system then determines whether the individual punch was an In or an Out, based on the last punch the employee did.
For data input	Enter the length of time (duration) the employee will have to enter information after the badge is swiped.

Setting	Definition
Displayed messages	Enter the length of time (duration) the message displays on the time clock in seconds. For example, 2 means the message displays for two seconds. The maximum message timeout is 9 seconds. If 0 is entered, no message displays.
Validation	Check this box to validate Job Costing entries when they are entered at the clock. The F5 function key is configured for Change Department. Only those Levels that have the Validate box checked will be validated. After turning on Validation, the clock must be programmed. This option is only available with the Job Costing/Validation module.
Download messages	Check this box to download employee messages to the clock for display when they punch in. If an employee does not have a message assigned to them, and this is checked, they will not be able to punch in on an ATS series clock.

3. The *Miscellaneous* tab defines clock defaults and contains the following information:

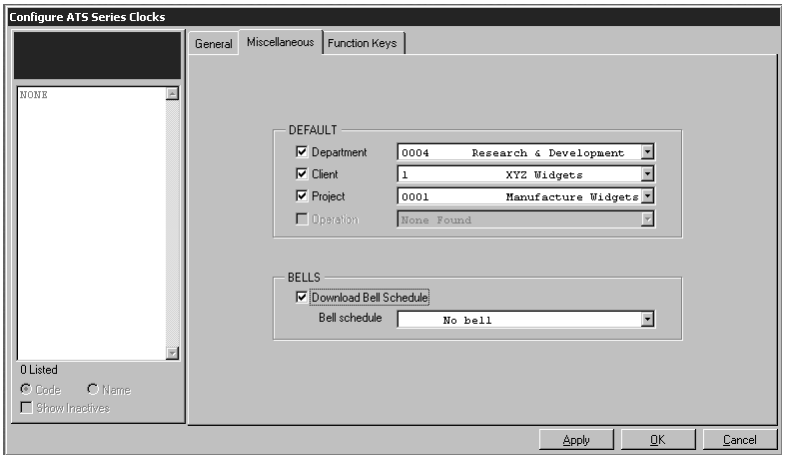


Figure 306: Configure ATS Clocks: Miscellaneous tab

Setting	Definition
Clock Defaults	Each clock can be assigned a default Department, Job, Step, and Operation (if applicable). A function key is defined for the Defaults in Function Key Setup. Using the defined function key will automatically transfer that employee into the Defaults.
Department	Select the default Department for this clock.

Job	Select the default Job for this clock, if applicable.
Step	Select the default Step for this clock, if applicable.
Operation	Select the default Operation for this clock, if applicable.
Download Bell Schedule	Check this box to download a pre-defined Bell Schedule to this clock. This option is only available with the Bell Schedule module.
Bell Schedule	Select the pre-defined Bell Schedule you wish to assign to this clock.

4. The *Function Keys* tab allows you customize the clock's keypad. As customizing the keypad can be an extensive process, a section of this manual has been dedicated to it. See ***Customizing Function Keys***, page 370. This section merely describes the contents of the screen.

   The tab contains the following information:

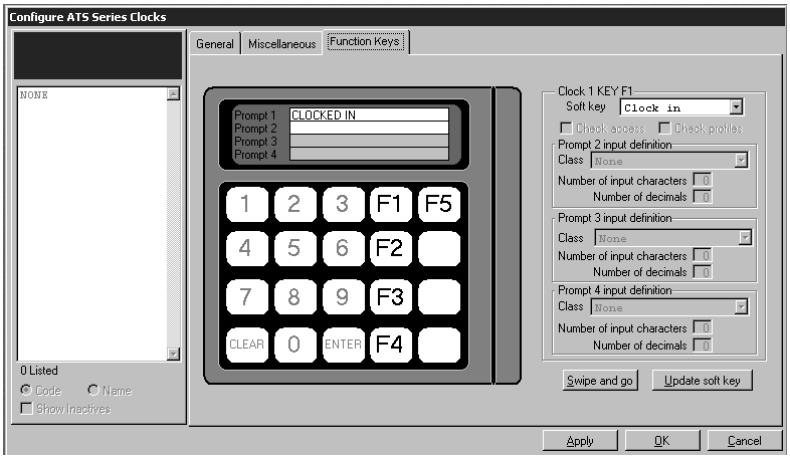


Figure 307: Configure ATS Clock: Function Keys tab

Setting	Definition
Clock Code	Displays the unique ID code assigned to this clock.
Soft Key	Displays the software function currently assigned to the selected key. See page 371 for a description of the functions available.
Prompt	Displays the prompt associated with the function key. The prompts themselves are entered in the Prompt area in the upper left corner of the keypad display. Up to four prompts are available. For more information on creating custom prompts, see page 371.

Setting	Definition
Class	The Class defines the information being entered, for reporting. For example, is it a department number, tips, etc.? Class choices cannot be added. If None is chosen, the Type setting will not be available.
Number of Input Characters	Enter total number of characters that can be entered for this Prompt. The number displayed in this field is based on the Class selected, but may be changed.
Number of Decimal	Enter the number of places after the decimal point for a numeric entry. A maximum of **4** decimal places may be entered. This field will only be available if a Numeric option was chosen in the Class field.
Update Soft Key	Click this button to commit the changes made to a key's functions or settings.
Swipe and Go	Click this button to display the Swipe and Go function, since there is no actual Swipe and Go function key. Swipe and Go occurs when an employee swipes a card through the clock, and is not asked to enter a function. All swipes are either In or Out punches. Selecting Swipe on the Function Key dropdown menu provides the same information. The Swipe and Go function will work with all methods of punching, as long as it is activated under Configure Main Company. (See ***Main Company***, page 28).

Hand Reader Clocks

The Hand Reader biometric terminals are powerful computers capable of Hand Geometry recognition. These devices collect clock data for Genesis Pro.

NOTE: Hand Reader Clocks are not Third Party Terminals; therefore they do not require a separate module.

Configure a Hand Reader Clock

1. Click the **Clocks** menu**, Configure, Hand Reader**. The *Configure Clocks* dialog box will open. The *Configure* dialog box contains several tabs, all of which are described below.

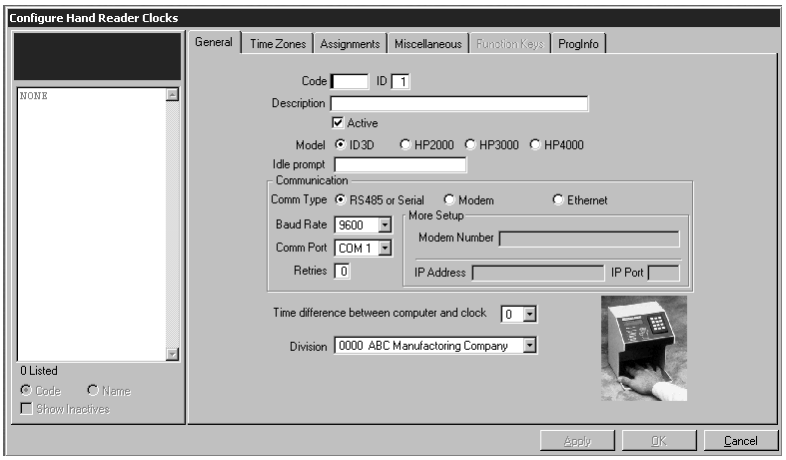


Figure 308: Configure Hand Reader Clock

2. The *General* tab configures communication settings and contains the following information:

Setting	Definition
Code	This is a required field. Enter a unique code (up to 4 characters) to identify the clock. Once defined, this code cannot be changed.
ID	Enter a unique ID number to identify the clock. This number will also be programmed into the clock.
Description	Enter a description of the clock. This description will be seen in the system and on reports. This field can be used to describe the clock type and it's location in your facility (i.e. HP3000 In BUILDING TWO). The clock description can be up to 30 characters long
Active	Click the Active check box to indicate that the clock is currently in use. Uncheck this box if the clock is not being used at this time.
Model	Select the model of your Hand Reader unit. The options: • ID3D • HP2000 • HP3000 • HP4000
Idle Prompt	Enter the message text that displays on the time clock when in an idle state. If this field is left blank, no message will be displayed.
RS485 or Serial	Select this option to choose an RS485 or RS232 connection.
Modem	Select this option to choose a modem solution.
Ethernet	Select this option to choose an Ethernet solution.

Setting	Definition
Baud Rate	Select the applicable communication speed. Make sure the baud rate selected here matches the baud rate defined at the clock. • **Rs485, Serial and Ethernet**: **9600** baud • **Modem**: **9600** baud
Comm Port	Select the communications port on your computer that will be used to communicate with the clock. The factory default is **COM 1.**
Retries	Enter the number of times the computer should attempt to connect to the clock if communication either fails or is interrupted during polling.
Modem number	Enter the phone number the PC modem must dial to communicate with this clock. The number must be entered in the following format: **Outside Line Access Code, Wait Symbol, Area Code, Phone Number** If no outside line is required (such as 9), simply enter the phone number. Omit the area code if not applicable. On most modems, the wait symbol is a comma (,) typically representing a one second pause. Multiple wait symbols can be used if necessary.
IP Address	Enter the IP address assigned to the Etherlink converter. DO NOT enter leading zeros.
IP Port	Displays the port used for Ethernet. The default is 300 and should not be changed. Altering this number will result in communication failure.
Time difference between clock and computer	Enter the time difference (in hours) between the computer and time clock. Since the computer can set the clock's time, this field compensates for time zone differences between the computer's location and the clock's location. When the clock's time is set, the system either adds or subtracts this time difference from the computer's clock. A setting of **0** indicates that the clock and computer are in the same time zone.
Division	Select the company division where the clock is located. Every transaction entered on this clock is tagged with this division code.

3. The *Time Zones* tab sets time periods during which the clock can be used. When a person is entered into the Hand Reader, they must be assigned a Time Zone. Up to 60 Time Zones can be configured per clock. HP2000 Hand Punch clocks do not support Time Zones. 4 windows for punching may be setup for each Time Zone. By default, the Hand Punch allows punches at any time.

   The Time Zones table contains the following information:

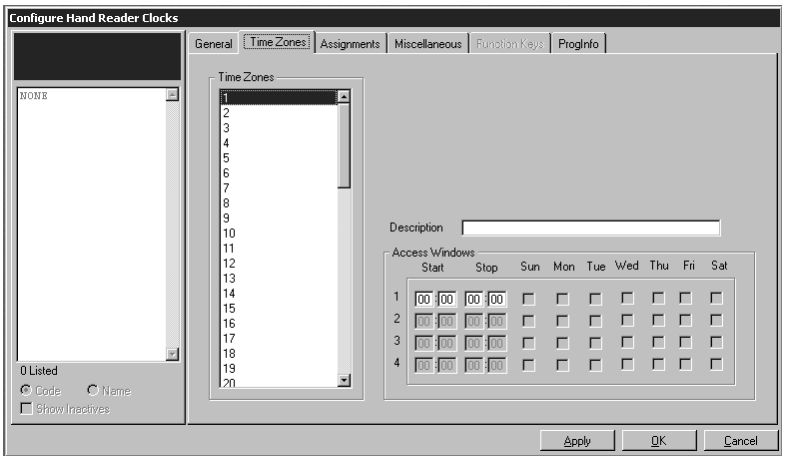


Figure 309: Configure Hand Reader Clocks: Time Zones tab

Setting	Definition
Time Zones	Displays the number of the Time Zones. There are 60 available Time Zones. Each time zone can have up to four Access Windows.
Description	Enter a description for each Time Zone.
Access Windows	These settings determine the times or windows during which the clock can be used.
Start	Enter the time at which the clock will start accepting punches. The time must be entered in military time. The default value is 00:00. **TIP**: To indicate that the clock can accept punches all day, enter 00:00 in the Start and 23:59 in the stop.
Stop	Enter the time at which the clock will stop accepting punches. The time must be entered in military time. The default value is 00:00. **TIP**: To indicate that the clock can accept punches all day, enter 00:00 in the Start and 23:59 in the stop.
Day of the Week	Check the day(s) of the week each Access Window will be in effect.

4. The *Assignments* tab lists the employees that can use this clock. This is necessary because the Hand Reader clocks take measurements of an employee's hand. Each time the employee punches, the reader compares the employee's hand to the existing template. Employee information and hand templates are stored in the Hand Reader clock. For this reason, employees must be assigned to a clock so their name and template will be downloaded to the correct clock.

   The tab contains the following information:

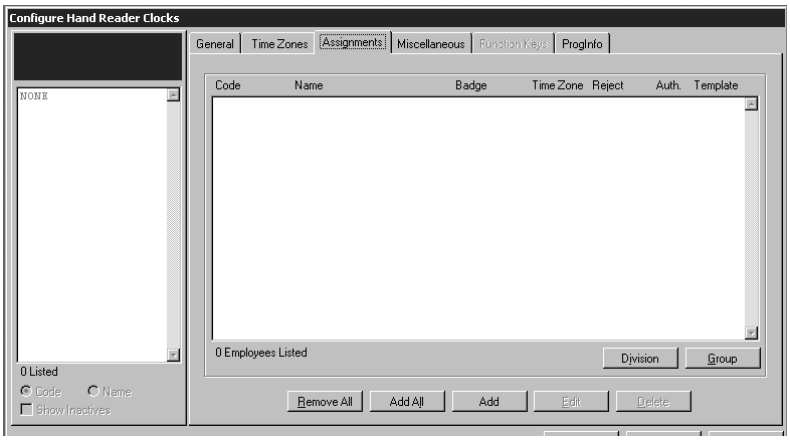


Figure 310: Configure Hand Reader Clock: Employee tab

Setting	Definition
Employee Listing	Displays a list of the employees that can use this clock. Includes: employee ID, employee name, employee badge number, assigned time zone, personal reject threshold, authority level, and if they have a hand template saved.
Division	Click this button to select employees based on Division. Employees selected are assigned the default Time Zone, Reject Threshold, and Authority automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another ***Time Zone***, ***Reject Threshold***, and ***Authority Level.***
Group	Click this button to select employees based on Group. Employees selected are assigned the default Time Zone, Reject Threshold, and Authority automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another ***Time Zone***, ***Reject Threshold***, and ***Authority Level.***
Remove All	Click this button to remove all employees currently assigned to the clock.
Add All	Click this button to assign all employees to the clock. Employees selected are assigned the default Time Zone, Reject Threshold, and Authority automatically. **NOTE**: If you use this method to choose employees, you may want to Edit the employee in order to choose another ***Time Zone***, ***Reject Threshold***, and ***Authority***.

Setting	Definition
Add	Click this button to select employees individually. You will be prompted to select the following: **Time Zone**: Select the Time Zone (defined on the previous tab) that applies to this employee. **Reject Override**: The reject threshold indicates how closely the hand has to match the original scanned hand template. The lower the number, the more exact the match needs to be. 0 is default and indicates that the default clock threshold (set on the Miscellaneous tab) will be used. **Authority Level**: The Authority Level defines which clock menus employee can view or use at the clock. 0 is the lowest (employee) and default, 5 is the highest and allows complete at-the-clock setup (supervisor).

5. The *Miscellaneous* tab defines default operations for the clock and contains the following information:

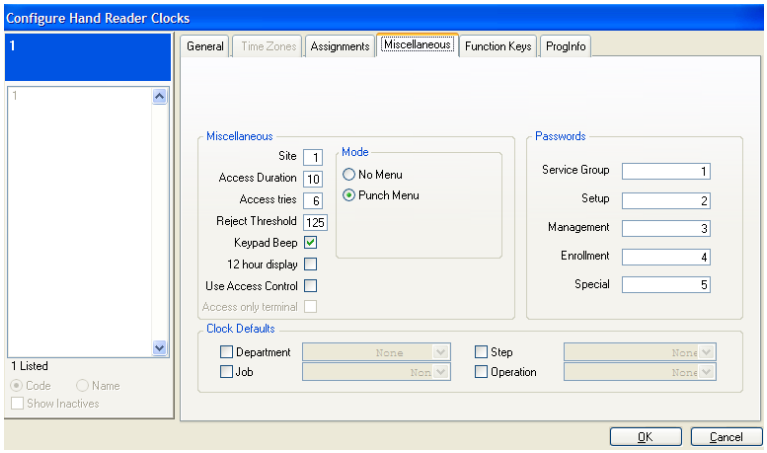


Figure 311: Configure Hand Reader Clock: Miscellaneous tab

Setting	Definition
Download Bell Schedule	Check this box to download a pre-defined Bell Schedule to this clock. This option is only available with the Bell Schedule module.
Bell Schedule	Select the pre-defined Bell Schedule you wish to assign to this clock.
Site	Enter a unique Site code for this clock. This field duplicates the Code or Description.
Access Duration	Enter the length of time, in seconds that the Access relay will keep the door open. This value needs to be entered in whole seconds.

Setting	Definition
Access Tries	Enter the number of times a user may attempt to punch into clock before being locked out. If an employee is locked out, that employee will not be able to punch until another employee succeeds at punching the clock.
Reject Threshold	The Reject Threshold indicates the point at which the clock will reject a hand that does not match its hand template. The lower the score, the closer the match needs to be. If an employee's punch score exceeds the Reject Threshold, a reject tone will sound and the punch will not be accepted.
Keypad beep	Check this option to cause a beep to sound when keys are pressed on the clock keypad.
12 hour display	Check this option to display times in 12-hour format on the clock screen.
Use Access Control	Check this box to use the clock for Access Control to buildings.
Access Only terminal	Check this box to use this clock for building access only. The clock will not record time punches such as Clock In, Start Lunch, etc.
Mode	These settings determine what type of punches the clock can accept. The options available in this area depend on the type of Hand Reader clock being configured. **No Menu**: Use if Swipe-and-Go will be used. Allows custom configuration of function keys on all models except ID3D. (Available on all clocks). **Punch Menu**: Use default menus in hand reader clock. (Available on all clocks). **Department with No Menu**: ID3D hand reader clocks do not allow for configuration of function keys. This option enables department transfers. (ID3D only). **Department with Punch Menu**: Allows use of ID3D built in menu system. (ID3D only).
Passwords	Each Clock Configuration menu needs a unique password assigned. For information on how to access the menus from the clock and the options available under each menu, see the Hand Punch manual. Passwords are numeric and can be up to 10 digits long.
Service Group	Enter the password associated with the Service Group settings at the clock. The default is 1.
Setup	Enter the password associated with the Setup settings at the clock. The default is 2.
Management	Enter the password associated with the Management settings at the clock. The default is 3.

Setting	Definition
Enrollment	Enter the password associated with the Enrollment settings at the clock. The default is 4.
Special	Enter the password associated with the Special settings at the clock. The default is 5.
Clock Defaults	Each clock can be assigned a default Department, Job, Step and Operation.
Department	Select the default Department for this clock, if applicable.
Job	Select the default Job for this clock, if applicable.
Step	Select the default Step for this clock, if applicable.
Operation	Select the default Operation for this clock, if applicable.

6. The *Function Keys* tab allows you customize the clock's keypad. The Hand Reader only has two keys which can be programmed: F1 and F2. The ID3D does not allow you to customize the keypad; therefore this tab will be grayed out if ID3D is selected.

   NOTE: The Hand Reader 4000 has 10 function keys. Eight are user definable. Choose “No Menu” on the miscellaneous tab to activate.

   The tab contains the following information:

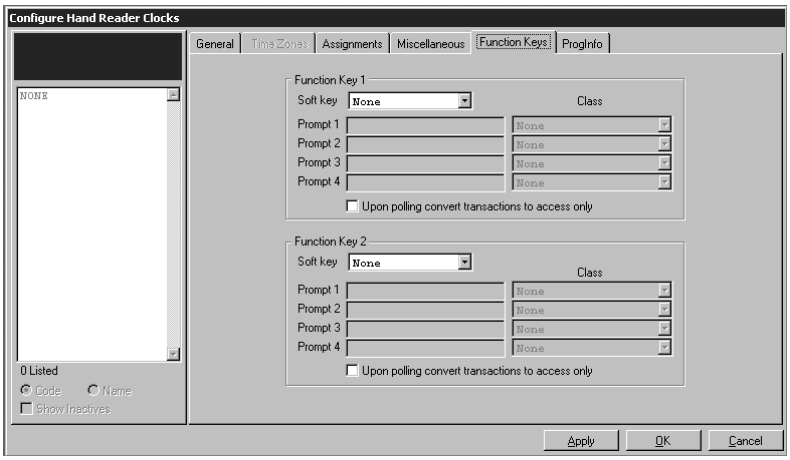


Figure 312: Configure ATS Clock: Function Keys tab

Setting	Definition
Function Key Number	Displays the function key number being edited.
Soft Key	Select the function you wish to assign to this key. See page 371 for a description of the functions available.

Setting	Definition
Prompt 1-4	Enter the text prompt you wish to display on the clock's screen when this button is used. You may enter up to four prompts, each of which may require additional input from the employee. For example, you might have the F1 key prompt the employee to enter Piece Rate information, prompting first for the number of "good" pieces and next for the number of "bad" pieces.
Class	Select the type of information that will be asked for from the employee. For example, for an ENTER TIPS prompt, you would choose the class Tip1 or Tip2. This field will not become available until you enter a Prompt. See page 372 for a description of the classes available.

NOTE: Upon polling convert transaction to access only. This is used mainly to track access without the time and attendance * written for one person in particular.

7. The *Prog Info* tab contains the information that was sent to the clock after any type of programming.

Customizing Function Keys

Although each clock's keypad is slightly different, the basic procedures for customizing the function keys are the same. There are four basic steps:

1. Select the key you wish to customize
2. Select the function you wish to assign to the clock.
3. Enter up to four prompts for information that will display when the key is pressed.
4. Define the type of information to be entered following each one of the prompts.

When the clock's function key is pressed the first prompt displays. After an employee enters the appropriate response to the first prompt, the second prompt displays, and so on. This continues until all prompts are displayed or an unsuitable response is encountered. *At least one prompt or message must be entered per function*.

Pre-Defined Function Keys

TA500, 600 Series, and PC Clock

There are 12 programmable function keys on the keypad. These are numbered **0** through **9**, **In** and **Out**. Some of these keys come preset from the factory but can be modified or reassigned.

Function Key	Definition
0	Change (department, job, step, etc.)
1	None
2	None
3	None
4	Out for Lunch
5	None
6	In from Lunch
7	None
8	Supervisor Overtime Approval
9	Category Entry
In (10)	Clocked In
Out (11)	Clocked Out

Available Functions

The following table describes the functions that are available and their uses:

Function	Definition	Sample Prompt
None	Function key unassigned	No message.
Clock In	Clock In	Prompt 1 **CLOCKED In**
Clock Out	Clock Out	Prompt 1 **CLOCKED Out**
Blank	System ignores entry	No message required.
Change	Transfer an employee to another level	Prompt 1 **ENTER DEPT.** Prompt 2 **ENTER JOB** Prompt 3 **ENTER STEP** Prompt 4 **ENTER OPER.**

© January 2009 Time America, Inc.

Function	Definition	Sample Prompt
Out on Break	Clock Out for break	Prompt 1 **Out FOR BREAK**
In from Break	Clock In from break	Prompt 1 **In FROM BREAK**
Out for Lunch	Clock Out for lunch (factory preset)	Prompt 1 **Out FOR LUNCH**
In from Lunch	Clock In from Lunch (factory preset)	Prompt 1 **In FROM LUNCH**
Level Change to Clock Default	Transfer employee to the clock default level.	Prompt 1 **CHANGED – O.K.**
Out on Service	Clock Out on service	Prompt 1 **Out ON SERVICE**
In on Service	Clock In on service	Prompt 1 **In ON SERVICE**
Category Entry	Post time In specific categories (vacation, sick, personal, etc.)	Prompt 1 **ENTER CATEGORY**
Group Transfer	Transfer a group of employees to another level (department, job, step, operation, etc.)	Prompt 1 **ENTER GROUP**
Group Transfer Back	Transfer group back to original level	Prompt 1 **ENTER GROUP**
Tip Entry	Enter tips	Prompt 1 **ENTER TIP AMOUNT**
Supervisor OT approval	Enter supervisor approved overtime	Prompt 1 **APPROVE OVERTIME**
Swipe & Go	Use “swipe and go” feature	Prompt 1 **PUNCH ACCEPTED**
Leave Request	Employees may submit a Leave Request and the Supervisor will approve in the Timecard.	Prompt 1 **ENTER CATEGORY**

Available Classes

Classes define the type of information to be entered following a prompt. The following table describes the classes that are available and their uses

Function	Definition
None	This class is used for all prompts or messages that do not require a response, such as CLOCKED In or PUNCH ACCEPTED
Department	This option classifies the input as a Department. The clock will be expecting a Department number to be entered.

Function	Definition
Job	This option classifies the input as a Job. The clock will be expecting a Job number to be entered.
Step	This option classifies the input as a Step. The clock will be expecting a Step number to be entered.
Operation	This option classifies the input as an Operation. The clock will be expecting an Operation number to be entered.
Category Code	This class is used to enter miscellaneous entries (such as Absences, Per Diems, Vacation, etc.) at the clock. **TIP**: A prompt asking for a dollar amount or number of hours to be added or subtracted should follow it.
Hours to Add	This class is used to enter hour additions (adjustment) to the employee's time. This could be used to grant bonus hours, or to make time adjustments from previous pay periods.
Hours to Subtract	This class is used to enter hour subtractions (adjustment) from the employee's time. This could be used to make time adjustments from previous pay periods.
Dollars to Add	This class is used to enter dollar additions (adjustment) to the employee's time. This could be used to add Bonuses or Commissions from the clocks.
Dollars to Subtract	This class is used to enter dollar subtractions (adjustment) from the employee's time. This could be used to deduct Union Dues or payments from the clocks.
Overtime Accrue	This class is used to specify if hours entered through a Category Code, Hours to Add, or Hours to Subtract, should count toward overtime. The classes Overtime Accrue and Overtime Level are only appropriate with hours, not dollar amounts. The valid entries for Overtime Accrue are **0** (do not accrue) and **1** (accrue).
Overtime Level	This class is used in conjunction with the Overtime Accrue to indicate the OT level at which the overtime that are accruing should be paid. The valid entries for Overtime Level are **0** (regular time), **1** (OT1), **2** (OT2), and **3** (OT3).

Function	Definition
Group Code	This class transfers a group of employees from their current level assignment to another level. Another function key can be assigned to transfer them back. When defining a key for the group transfer, you must first identify the group code you are transferring. The **Group Code** class is used for this purpose.
Tip1	This class is used to enter and total tips (typically cash or charge tips). Tips entered with this class are reported on the employee's time card and added to the category TIP1 for reporting.
Tip2	This class is used to enter and total tips (typically cash or charge tips). Tips entered with this class are reported on the employee's time card and added to the category TIP2 for reporting.
Accepted Quantity	This class is used to enter Piece Rate information. The Accepted Quantity indicates the number of pieces that were successfully completed. This option is only available if the optional Job Costing module is installed and the Level being worked on is configured for Piece Rate. These quantities apply to the current department, job and step levels the employee is working at the time of entry.
Rejected Quantity	This class is used to enter Piece Rate information. The Rejected Quantity indicates the number of pieces that were not successfully completed. This option is only available if the optional Job Costing module is installed and the Level being worked on is configured for Piece Rate. These quantities apply to the current department, job and step levels the employee is working at the time of entry.
Generic Entry	This class is used to collect custom data for use by another software system. If you're collecting numeric values, such as a dollar amount, use **Generic Decimal Quantity** to specify the number of decimal places.
Generic dec. quantity	If you're collecting numeric values, such as a dollar amount, use **Generic Decimal Quantity** to specify the number of decimal places. An entry of **0** indicates a whole number.

Function	Definition
Tip3	This class is used to enter and total tips (typically banquet or other tips). Tips entered with this class are reported on the employee's time card and added to the category TIP3 for reporting.
Tip4	This class is used to enter and total tips (typically banquet or other tips). Tips entered with this class are reported on the employee's time card and added to the category TIP4 for reporting.
Task	This option classifies the input as a Task. The clock will be expecting a task number to be entered.

Customize Function Keys

1. Navigate to the *Function Keys* tab of the clock you wish to edit. See the ***Configure*** section for the type of clock you are customizing: TA500/600, PC Clock page 305; ATS, page 357; Hand Reader, page 362.
2. Select the key you wish to configure on the keypad figure on the left of the dialog box.

   NOTE: Not all function keys can be edited. The settings on the right side of the dialog box will remain grayed out if you have selected a key that cannot be edited.
3. The fields on the right side of the screen will display the current settings for the button, if any.

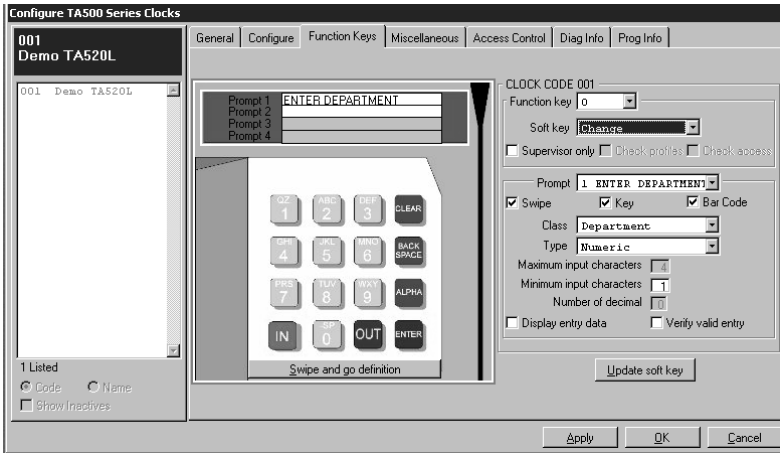


Figure 313: Customizing Function Keys (Example shows a TA520 keypad)

4. Edit the settings as appropriate:

Setting	Definition
Clock Code	Displays the unique ID code assigned to this clock.
Function Key	Displays the function key number of the key selected on the keypad graphic to the left.

Setting	Definition
Soft Key	Select the software function you wish to assign to the key. See page 371 for a description of the functions available.
Prompt 1 through 4 (Prompt area)	Enter the Prompt(s) you wish to display when the employee presses the selected function key. You may enter up to four prompts per key. At least one prompt must be entered. **NOTE**: The Prompt settings in the lower right of the screen will not become available until you have entered at least one prompt.
Supervisor only	Check this box to allow only supervisor access to this function key. (Supervisor access is gained by swiping a supervisor badge in the clock.) This is used for function keys that collect data or change employee assignments, such as Group Transfer or Category Entry. Clearing this box permits any employee to access this function key.
Check Profiles	Check this box to enforce Profile Lockouts. This option is only used when the optional Access Control and Profile Lockout module is installed. Checking this box means that when an employee swipes a badge and presses this function key, the clock will check the Profile information to make sure the employee is allowed to use clock during this time. If the box is unchecked, the Profile table will not be accessed to verify the information. **NOTE**: The Profile Access Module needs to be installed, and a Profile needs to be assigned to the clock, before this checkbox is available. This option will work only after a Profile is setup, assigned to the correct employees, and assigned to the clock. The clock needs to be polled with the Program clocks and Load Profile Tables options checked.
Check Access	Check this box to enforce Profile Access. Access is used to open doors or other electric lock type enclosures. If a valid badge is used, the door will open. When used in conjunction with Profiles, Profiles will take over the verification process. If the employee is confirmed to be able to use this function key at this time, the door will open. **NOTE**: The Profile Access Module needs to be installed, and Access must be defined for the terminal, before this checkbox is available.

Setting	Definition
Prompt	Displays the prompt associated with the function key. The prompts themselves are entered in the Prompt area in the upper left corner of the keypad display. Up to four prompts are available. **NOTE**: These Prompt settings will not become available until you have entered at least one prompt in the ***Prompt*** area in the upper left of the screen.
Swipe	Check this box to indicate that employees must swipe a magnetic badge to enter the information requested by the prompt. **Example:** Enter Department
Key	Check this box to indicate that employees may key the information requested by the prompt. **Example:** Enter Tips
Bar Code	Check this box to indicate that employees must swipe a bar code to enter the information requested by the prompt. **Example:** Enter Job
Class	Select the class of information to be entered following the prompt. See page 372 for a description of the classes available. **NOTE**: If None is chosen, the ***Type*** setting will not be available.

Setting	Definition
Type	Select the data Type for the information being entered. The settings in Company Defaults of Main company determine which Type options are available for each Class. The options are: **Alphabetic**: Clock will accept letters only for this entry. **Numeric**: Clock will accept numbers only for this entry. **Alphanumeric**: Clock will accept both numbers and letters. **Number with forced decimal places**: Clock will accept numbers only and will automatically place the last two numbers entered behind the decimal place. (For example, if 1499 is entered, the clock will format it as 14.99). **Alphanumeric – hidden entry**: Clock will accept letters only; the letters will not display on the clock's screen. **Number – hidden entry** Clock will accept numbers only; the numbers will not display on the clock's screen.
Maximum Input Characters	Enter the maximum total number of characters that can be entered for this Prompt. The number displayed in this field is based on the ***Class*** selected.
Minimum Input Characters	Enter the minimum number of characters that can be entered for this Prompt. The default value for this field is 1, but may be changed.
Number of Decimal	Enter the number of places after the decimal point for a numeric entry. A maximum of **4** decimal places may be entered. This field will only be available if a Numeric option was chosen in the ***Class*** field.
Display Entry data	Check this box to display the input information.
Verify valid entry	Check this box to enforce the Validation available with the Job Cost/Validation Module. Validation must be turned on for each level, Download Names must be checked under the miscellaneous tab, and Load Level Validation must be checked as a polling option. The clock will check the input information against the downloaded level information. If the level entry does not exist at the time of the last programming, the data will be considered invalid.

Setting	Definition
Swipe and Go Definition	Click this button to display and edit the Swipe and Go function, since there is no actual Swipe and Go function key. Swipe and Go occurs when an employee swipes a card through the clock, and is not asked to enter a function. Selecting Swipe on the Function Key dropdown menu provides the same information. The Swipe and Go function will work with all methods of punching, as long as it is activated under Configure Main Company. (See ***Main Company***, page 28).

5. When all settings are complete, click the **Update Soft Key** to commit the changes.

Add a Clock

1. Click the **Clocks** menu**, Configure**, and select the type of clock you wish to add. The *Configure Clock* dialog box will open.
2. Click the **Add** button. If this is the first clock of this type that you are adding, the *General* tab will become available.

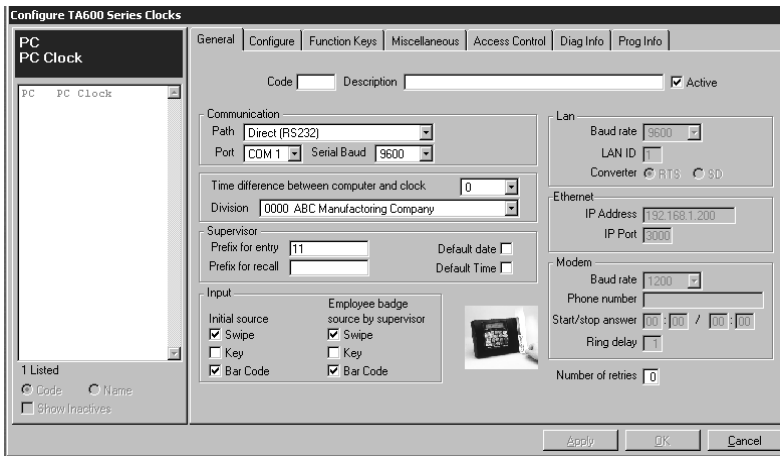


Figure 314: Example: Add a Clock

3. Fill in the settings as described in the Configure section for the type of clock you are adding. TA500/600, PC Clock page 305; Web Clock page 342; ATS, page 357; Hand Reader, page 362.
4. If there is already a clock of this type defined, the *Default Clock Add* dialog box will open.

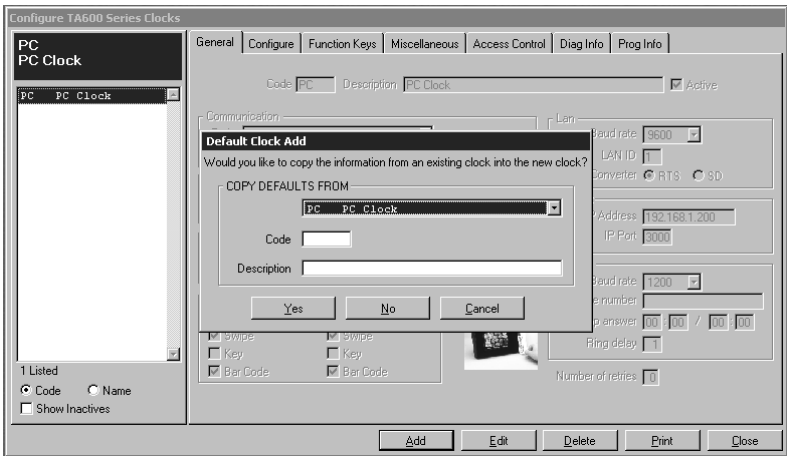


Figure 315: Default Clock Add

5. Highlight the clock whose settings you would like to copy or click **No** to start from scratch.
6. Enter a unique code for this clock, up to four characters.
7. Enter a ***Description*** of the clock (i.e., Warehouse, Back Office, California, etc.)
8. Click the **Yes** button to continue. You will be returned to the *General* tab.
9. Fill in the settings as described in the Configure section for the appropriate clock. See TA500/600, page 305; ATS, page 357; Hand Reader, page 362.
10. When all settings are complete, click **OK** to commit the changes.

Edit a Clock

1. Click the **Clocks** menu**, Configure** and select the type of clock you wish to edit. The *Configure Clock* dialog box will open.
2. Highlight the Clock you wish to edit using the drop-down list at the top of the screen.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected category.
4. Edit the settings as described in the *Configure Clock* section for the clock you are editing.
5. When all settings are complete, click **OK** to commit the changes.

Delete a Clock

1. Click the **Clocks** menu**, Configure** and select the type of clock you wish to edit. The *Configure Clock* dialog box will open.
2. Highlight the Clock you wish to edit using the drop-down list at the top of the screen.
3. Click the **Delete** button. You will be prompted:

Figure 316: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Clock* dialog box.

Videx Data Collectors

The Videx can record employee routes, time, and monitor productivity for a multitude of industries including Security, Manufacturing, Retail, Hospitals and Healthcare. The Videx can have multiple configurations ranging from a simple route to complex route and issue tracking. Videx is a contact bar code and Touch Memory button reader. Videx brings you the latest in highly functional portables.

1. Click the **Clocks** menu**, Configure, Videx**. The *Configure Videx Data Collectors* dialog box will open. The dialog box contains several tabs, all of which are described below.

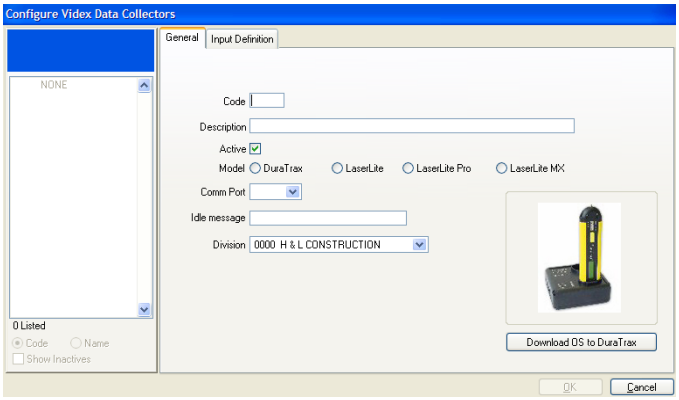


Figure 317: Configure Videx Data Collectors: General tab

2. The *General* tab defines the communication and general operation settings and contains the following information:

Setting	Definition
Code	This is a required field. Enter a unique code (up to 4 characters) to identify the data collector. Once defined, this code cannot be changed.
Description	Enter a description of the data collector. This description will be seen in the system and on reports. This field can be used to describe the clock type and it's location in your facility (i.e. Videx In BUILDING TWO). The clock description can be up to 30 characters long.
Active	Click the Active check box to indicate that the data collector is currently in use. Uncheck this box if the data collector is not being used at this time.

Model	Select the model of your Videx Data Collector. The options: • Dura Trax • LaserLite • LaserLite Pro • LaserLite MX
Comm Port	Select the communications port on your computer that will be used to communicate with the data collector.
Idle Message	Enter the message text that displays on the time clock when in an idle state. If this field is left blank, no message will be displayed. The idle message will hold up to 16 characters.
Division	Select the Division that the data collector is for.
Download OS	Click this button to download the operating system to the data collector.

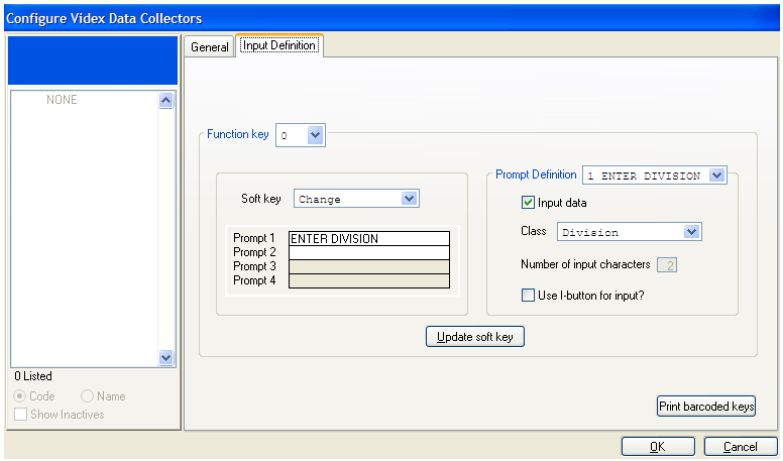


Figure 318: Configure Videx Data Collectors: Input Definition

3. *Input Definition* tab specifies the message and timeout settings and contains the following information:

Setting	Definition
Function Key	Displays the function key number of the key selected.

Soft Key	Displays the software function currently assigned to the selected key.
Prompt 1 through 4 (Prompt Area)	Enter the Prompt(s) you wish to display when the employee presses the selected function key. You may enter up to four prompts per key. At least one prompt must be entered. **NOTE**: The Prompt settings to the right of the screen will not become available until you have entered at least one prompt.
Prompt Definition	Displays the prompt associated with the function key. The prompts themselves are entered in the Prompt area to the left of the screen. Up to four prompts are available.
Input Data	Select this feature to enable data input.
Class	The Class defines the information being entered, for reporting. For example, is it a department number, tips, etc.? Class choices cannot be added. If None is chosen, the Type setting will not be available. See page 372 for a description of the classes available.
Number of input characters	The number of characters that can be entered for this Prompt.
Use I-button for input?	Select this feature to activate I-button use for data input.
Update soft key	Click this button to commit the changes made to a key's functions or settings.
Print barcoded keys	Allows you to generate barcodes for the selected keys. This can save time and effort at the clock, not to mention helping to ensure that the numbers entered are accurate.

Add a Data Collector

1. Click the **Clocks** menu**, Configure**, and select the type of clock you wish to add. The *Configure Videx Data Collectors* dialog box will open.
2. Click the **Add** button. If this is the first data collector of this type that you are adding, the *General* tab will become available.

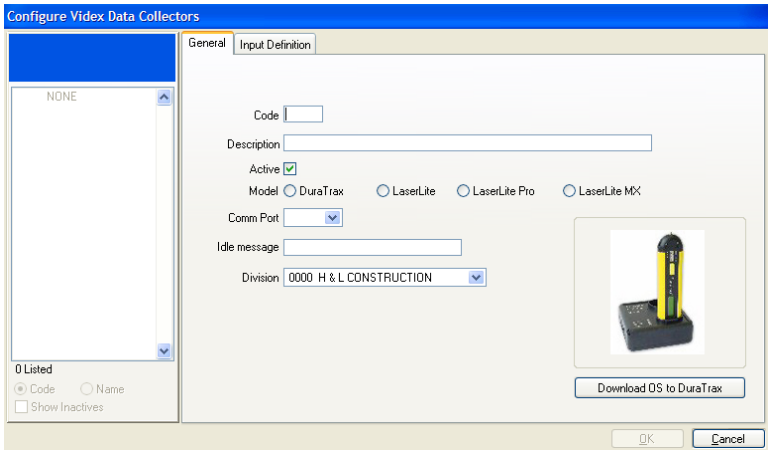


Figure 319: Example: Add a Videx Data Collector

3. Fill in the settings as described in the *Configure Videx Data Collectors* section.
4. Click on the Input Definition tab.

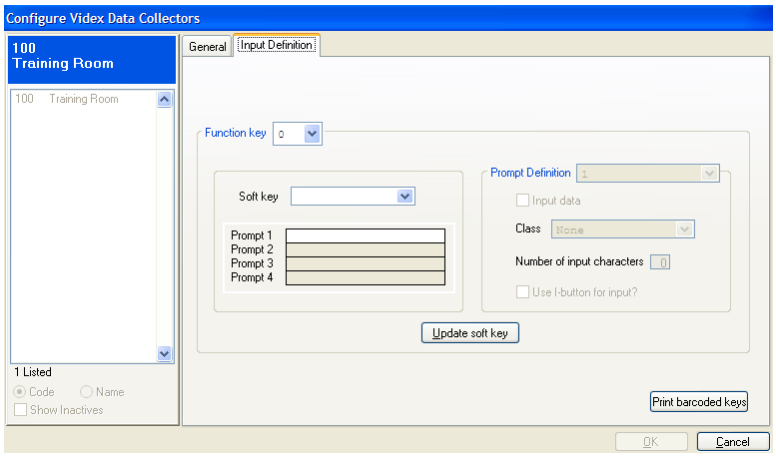


Figure 320: Adding Videx Data Collector

5. Fill in the settings as described in the *Configure Videx Data Collectors* section.
6. When all settings are complete, click **OK** to commit the changes.

Edit a Data Collector

1. Click the **Clocks** menu**, Configure** and select the type of clock you wish to edit. The *Configure Videx Data Collectors* dialog box will open.
2. Highlight the Data Collector you wish to edit.
3. Click the **Edit** button. The *General* screen will become available for you to edit the selected category.
4. Edit the settings as described in the *Configure Videx Data Collector* section.
5. When all settings are complete, click **OK** to commit the changes.

Delete a Data Collector

1. Click the **Clocks** menu**, Configure** and select the type of clock you wish to edit. The *Configure Videx Data Collectors* dialog box will open.
2. Highlight the Data Collector you wish to delete.
3. Click the **Delete** button. You will be prompted:

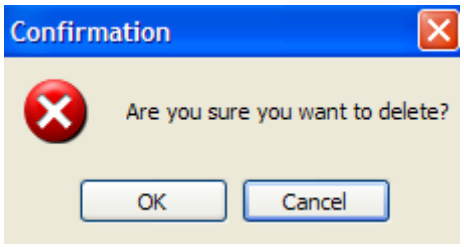


Figure 321: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the *Configure Videx Data Collectors* dialog box.

Set Date and Time

The Set Date and Time function synchronizes the date and time of the terminals with the computer that is running the software. You can set the date and time on one or more clocks. However, all clocks must be defined in **Clock Maintenance** before the date and time is set.

Before using this function, the host computer must be set to the correct date and time. Otherwise, all clock transactions will have an incorrect date and time stamp (although admittedly they'll all be synchronized).

NOTE: It is recommended that you do not perform this function during periods of high clock activity (such as the start of day when employees are clocking In).

1. Click the **Clocks** menu**, Set Date and Time**. The *Set Date and Time Clock Selection* dialog box will open.

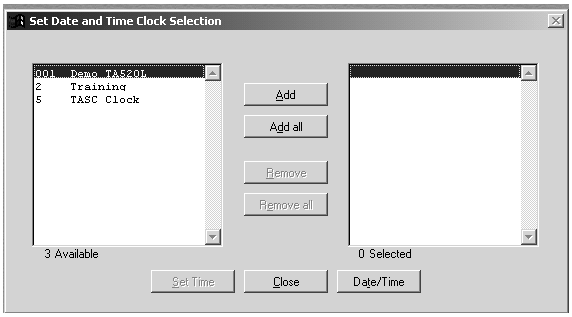


Figure 322: Set Date and Time

2. Select the clock(s) for which you wish to set the date and time by using the **Add** button to add the selected clock individually, or **Add All** to add all clocks.
3. Click the **Date/Time** button to display the *Windows Date/Time Properties* dialog box.

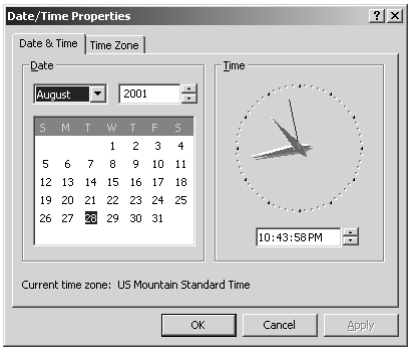


Figure 323: Windows Date/Time Properties

4. If necessary, edit the date and time to be accurate and click **OK**.
5. Click the **Set Time** button to commit the changes.
6. When Genesis Pro has finished sending the Date and Time to clock, click **Close** to exit the dialog box.

Chapter XII Terminal Polling and AutoProcessing

This section describes the concepts and techniques associated with polling clocks and setting up Auto Processes.

Polling is the process of communicating data to and from the clock, including transferring employee time transactions and other data from the clocks to the host computer (PC) for processing. Clocks can be manually polled or automatically polled on a pre-defined schedule.

AutoProcessing allows certain common tasks to be run automatically. Polling, Reports, custom files, and Reindexing can set to Auto Process.

Polling

Polling Time Clocks

Polling is the process of communicating data back and forth between the clock and Genesis Pro. Polling can be done manually, which means a supervisor or administrator must launch the Genesis Pro software and request that the clock be polled. Polling may also be set as an auto process, which means that the Genesis Pro is responsible for communicating with the clock on a pre-defined schedule.

This section describes how to poll the clock manually.

1. Click the **Clocks** menu**, Poll**. The *Poll Clock Selection* dialog box will open.

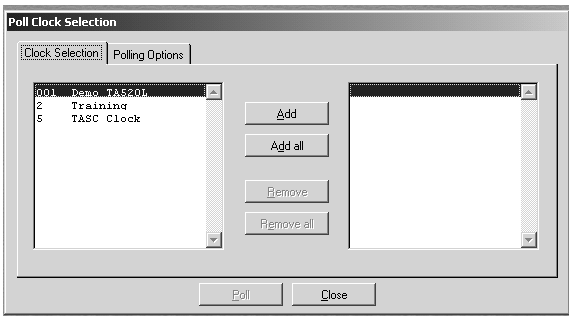


Figure 324: Poll Clock Selection

2. Select the clock(s) you wish to poll by using the **Add** button to add the selected clock individually, or the **Add All** button to add all clocks.
3. Click the *Polling Options* tab to select it. Fill in the settings as appropriate:

Setting	Definition
Poll Transactions	Check this option to transfer punches from the clock to Genesis Pro.

Clear Clock Transactions	Check this option to clear the transactions from the clock after transferring them to Genesis Pro. **TIP**: This does not need to be done every time. You may leave the transactions in the clock until payroll is processed successfully, however if you have a lot of employees you will want to clear frequently so the clock does not get full.
Set Clock Date and Time	Check this option to send the computer's current date and time to the clock. **TIP**: You may not want to do this every time, as the clock's internal clock tends to be much more accurate that the computer's.
Program Clock	Check this option to send programming and configuration information (such as the settings in the Configure Clock dialog box) to the clock. Clock function keys and function messages are sent to the clock during programming. This option should only be used when basic clock setup has been changed since the initial programming.
Load Bell Schedules	Check this option to send pre-defined Bell Schedule assigned to the clock. Bell schedules are only checked at midnight, so a bell will not ring on the same day the bell schedule was downloaded. The Bell Module must be installed to use this option.
Load Access Control table	Check this option to send the Access Control settings defined in Configure Clock to the clock. This option must be turned on in the clock setup, and the Profile/Access Module must be installed.
Load Profile tables	Check this option to send Profile Lockout settings to the clock. The Profile/Access Module must be installed to use this option.
Load Level Validation	Check this option to send Department, Job, Step and Operation number validation to the clock. When an employee punches in department, job, step, or operation number, it is compared to the defined codes that were downloaded from Genesis Pro. If the codes do not match, the input is rejected.

Load Messages	Check this option to send employee messages to the clock.
Hand Reader	These settings only apply to the Hand Reader clocks. The options are: **Send Hand Templates**: Select this option to send employee hand templates to the clock. This can be used to upload a template to a new clock, or to restore templates to a clock that has been cleared. **Clear Templates**: Check this option to clear the templates from the clock. **USE THIS OPTION VERY CAREFULLY**, as it will delete all existing templates in the clock and employees will not be able to punch until the templates are restored. **Retrieve Hand Templates**: Check this option to download new hand templates from the clock for input into the Genesis Pro database.
Process Punches after polling	Check this option to automatically put the punches into the online timecards of the employees.

4. Click the **Poll** button to start the polling process.

Polling Videx DuraTrax

Polling is the process of communicating data back and forth between the data collector and Genesis Pro. Polling can be done manually, which means a supervisor or administrator must launch the Genesis Pro software and request that the data collector be polled. Polling may also be set as an auto process, which means that the Genesis Pro is responsible for communicating with the data collector on a pre-defined schedule.

1. Click the **Clocks** menu**, Poll**. The *Poll Clock Selection* dialog box will open.

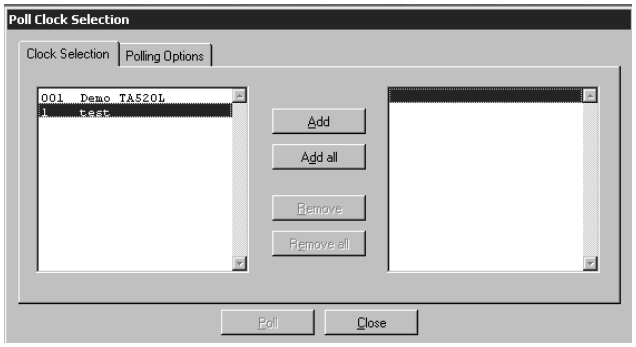


Figure 325: Poll Clock Selection

2. Select the Data Collector you wish to poll by using the **Add** button to add the selected data collector.

   NOTE: Data Collectors must be polled individually.

3. Click the *Polling Options* tab to select it. Fill in the settings as appropriate:

Setting	Definition
Poll Transactions	Check this option to transfer punches from the clock to Genesis Pro.
Clear Clock Transactions	Check this option to clear the transactions from the clock after transferring them to Genesis Pro. **TIP**: This does not need to be done every time. You may leave the transactions in the clock until payroll is processed successfully, however if you have a lot of employees you will want to clear frequently so the clock does not get full.
Set Clock Date and Time	Check this option to send the computer's current date and time to the clock. **TIP**: You may not want to do this every time, as the clock's internal clock tends to be much more accurate that the computer's.
Program Clock	Check this option to send programming and configuration information (such as the settings in the Configure Clock dialog box) to the clock. Clock function keys and function messages are sent to the clock during programming. This option should only be used when basic clock setup has been changed since the initial programming.
Load Bell Schedules	Check this option to send pre-defined Bell Schedule assigned to the clock. Bell schedules are only checked at midnight, so a bell will not ring on the same day the bell schedule was downloaded. The Bell Module must be installed to use this option.
Load Access Control table	Check this option to send the Access Control settings defined in Configure Clock to the clock. This option must be turned on in the clock setup, and the Profile/Access Module must be installed.
Load Profile tables	Check this option to send Profile Lockout settings to the clock. The Profile/Access Module must be installed to use this option.

Load Level Validation	Check this option to send Department, Job, Step and Operation number validation to the clock. When an employee punches in department, job, step, or operation number, it is compared to the defined codes that were downloaded from Genesis Pro. If the codes do not match, the input is rejected.
Load Messages	Check this option to send employee messages to the clock.
Hand Reader	These settings only apply to the Hand Reader clocks. The options are: **Send Hand Templates**: Select this option to send employee hand templates to the clock. This can be used to upload a template to a new clock, or to restore templates to a clock that has been cleared. **Clear Templates**: Check this option to clear the templates from the clock. **USE THIS OPTION VERY CAREFULLY**, as it will delete all existing templates in the clock and employees will not be able to punch until the templates are restored. **Retrieve Hand Templates**: Check this option to download new hand templates from the clock for input into the Genesis Pro database.
Process Punches after polling	Check this option to automatically put the punches into the online timecards of the employees.

4. Click the **Poll** button to start the polling process.

Configure an AutoProcess

The Auto Process feature allows you to schedule the following tasks to run automatically at pre-determined times:

- Poll one or more time clocks
- Launch executable programs
- Generate reports

No user interaction is required when using the Auto Process feature. In fact, you can poll time clocks, run reports, download payroll data, and back up the Genesis Pro data without ever touching the computer. The Auto Process feature is ideal for processes that need to be performed after working hours or during less busy times of the day.

Each automatic procedure can consist of one or more auto process *cycles*. Each cycle can run a program, poll the time clocks, or generate a report and is assigned a time and day(s) of the week

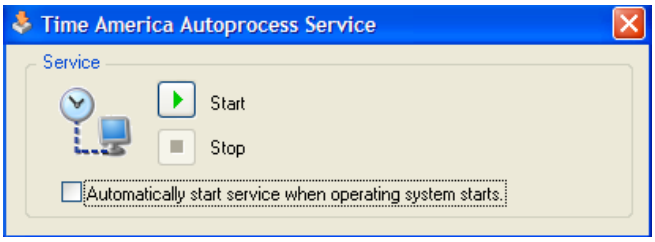
to run. To create an AutoProcess that runs several times a day, you will add several cycles: one for each time you wish the process to run.

Run as Service

The autoprocess can be configured to run as a service it must be installed locally as it will not run over a network. The server must run the service.

1. In Windows Explorer find the **Genesis Pro** folder. Locate and double-click **InstallAutoprocess**. A black command prompt window will flash.
2. In Windows Explorer find the **Genesis Pro** folder. Locate and double-click **autoProcess** this will install the automated User responsible for the Auto Process. A white Auto poll dialogue window will appear, but will give the message "nothing to poll."

   NOTE: To confirm the success of this action open **Genesis PRO** click the **File** menu, **Security**, **User Maintenance**. There will be a new user: Autoprocess Service.
3. Open **Genesis PRO**, click the **Clocks** menu, **Auto Process**. In the *Configure Auto Processing* dialog window select *1000 Autoprocess Service*, click **Edit** and configure your specific auto process features (see **Add an AutoProcess**).
4. Locate your system Services window and **Start** the Time America Auto Process or…
5. In Windows Explorer find the **Genesis Pro** folder. Locate and double-click **autoProcessServiceSetup** this will allow you to start the automated service.
6. Click the **Start** button. If you want the service to start when the operating system is starting, check the appropriate box.



Add an AutoProcess

1. Click the **Clocks** menu**, AutoProcess**. The *Configure Auto Process* dialog box will open.
2. Click the **Add** button and the *Auto Process Maintenance* dialog box will open.

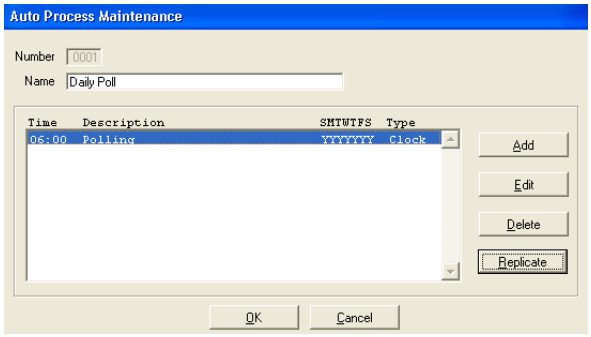


Figure 326: Configure Auto Process

3. Enter the Number and Name for this Auto Process.
4. Click the **Add** button. The *Auto Process Schedule Details* dialog box will open.

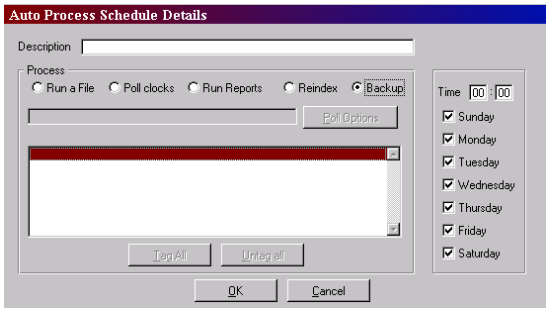


Figure 327: Auto Process Schedule Details

Setting	Definition
Description	Enter a description for this AutoProcess Schedule. Examples: Poll California Clock, Run Payroll Reports, etc.
Run a File	Select this option to schedule an Event that will launch any sort of executable program. An example of this might be a Batch file that "zips" up your data files and copies them to a safe location on your network. With this option selected, you must enter the path to the desired file.
Poll Clocks	Select this option to schedule an event that will poll the transactions from any or all of your time clocks. This Event can also perform any of the other normal time clock polling options. You must be sure to "tag" all the time clocks you want to poll by either double-clicking on them or selecting the "tag all" button. You must also select at least one polling option by clicking the "Poll Options" button.

Run Reports	Select this option to schedule an Event that will automatically run any of several reports such as "Missing Punches" or "Hours". You may notice that the list of available reports is greatly abridged and that none of the Payroll Exports are available. Time Card data should be thoroughly reviewed before running any Payroll Export. Each report to be run must be "tagged" by double-clicking it and choosing the desired settings in the Report Parameter Window. Once set, these parameters can be changed at any time by clicking the Report Options button.
Reindex	Select this option to schedule an event that will Reindex all the system databases. This Event must be scheduled at a time when it is most likely that all users will be logged out. If another user is logged into the system, this Event will be skipped.
Backup	Select this option to schedule an event that will Backup all the system databases. This Event must be scheduled at a time when it is most likely that all users will be logged out. If another user is logged into the system, this Event will be skipped.
Items List	The items that display in this list depend upon the type of AutoProcess chosen. For example, if Poll Clocks is selected, this list will display all the clocks configured in the program. To select a single item, double-click the item to "tag" it. Click the **Tag All** button to select all items.
Time	Enter the time at which you want the process to occur.
Day of the Week	Select the days of the week you want the process to occur.
Tag All/Untag All	Click the **Tag All** button to select all the items in the list. Click **Untag All** to deselect all the items in the list.

Poll Clocks AutoProcess

1. If ***Poll Clocks*** is selected, select the clock(s) you wish to poll with this process by double-clicking each clock to "tag" it.
2. If ***Poll Clocks*** is selected, click the **Polling Options** button to configure the settings for polling. The *Polling Options* dialog box will open.

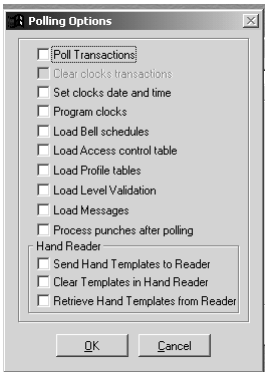


Figure 328: Polling Options

3. Check the options that are appropriate:

Setting	Definition
Poll Transactions	Check this option to transfer punches from the clock to Genesis Pro.
Clear Clock Transactions	Check this option to clear the transactions from the clock after transferring them to Genesis Pro. **TIP**: This does not need to be done every time. You may leave the transactions in the clock until payroll is processed successfully, however if you have a lot of employees you will want to clear more frequently so the clock memory does not fill up.
Set Clock Date and Time	Check this option to send the computer's current date and time to the clock. **TIP**: You may not want to do this every time, as the clock's internal clock tends to be much more accurate that the computer's.
Program Clock	Check this option to send programming and configuration information (such as the settings in the Configure Clock dialog box) to the clock. Clock function keys and function messages are sent to the clock during programming. This option should only be used when basic clock setup has been changed since the initial programming.

Setting	Definition
Load Bell Schedules	Check this option to send pre-defined Bell Schedule assigned to the clock. Bell schedules are only checked at midnight, so a bell will not ring on the same day the bell schedule was downloaded. The Bell Module must be installed to use this option. **NOTE:** This is not recommended with the TA520 or TA530, as the clock needs to roll past midnight for the bell schedule to take effect.
Load Access Control table	Check this option to send the Access Control settings defined in Configure Clock to the clock. This option must be turned on in the clock setup, and the Profile/Access Module must be installed.
Load Profile tables	Check this option to send Profile Lockout settings to the clock. The Profile/Access Module must be installed to use this option.
Load Level Validation	Check this option to send Department, Job, Step and Operation number validation to the clock. When an employee punches in department, job, step, or operation number, it is compared to the defined codes that were downloaded from Genesis Pro. If the codes do not match, the input is rejected.
Load Messages	Check this option to send employee messages to the clock.
Hand Reader	These settings only apply to the Hand Reader clocks. The options are: **Send Hand Templates**: Select this option to send employee hand templates to the clock. This can be used to upload a template to a new clock, or to restore templates to a clock that has been cleared. **Clear Templates**: Check this option to clear the templates from the clock. **USE THIS OPTION VERY CAREFULLY**, as it will delete all existing templates in the clock and employees will not be able to punch until the templates are restored. **Retrieve Hand Templates**: Check this option to download new hand templates from the clock for input into the Genesis Pro database.

Setting	Definition
Process Punches after polling	Check this option to automatically put the punches into the online timecards of the employees.

4. Click **OK** to commit the changes and return to the *Auto Process Maintenance* screen.
5. Click **OK** to commit the changes and return to the *Configure Auto Process Screen.*
6. Click **Start** to activate the Auto Process schedule.

   NOTE: Genesis Pro must be running for the Auto Process to work. You may minimize the Genesis Pro window.

   NOTE: For network installs, you will need to check that the network is not doing any backups or running any utilities during the auto processing schedule.

Run Reports AutoProcess

1. If ***Run Reports*** is selected, choose the report(s) you wish to run by double-clicking each report to "tag" it and filling in the report settings. The *Report Parameters* dialog box for the selected report will open.
2. Fill in the *Report Parameters* windows as described in the *Run Reports* section.
3. Click **OK** to commit the changes and return to the *Configure Auto Process Screen.*
4. Click **Start** to activate the Auto Process schedule.

Run a File AutoProcess

1. If ***Run a File*** is selected, you will be prompted to choose the file (program, etc.) to run.
2. When all settings are complete, click **OK**. The AutoProcess will begin on the next occurrence of the date and time specified in the *AutoProcess Schedule Details*.
3. Click **OK** to commit the changes and return to the *Configure Auto Process Screen.*
4. Click **Start** to activate the Auto Process schedule

Edit an Auto Process

1. Click the **Clocks** menu**, AutoProcess**. The *Configure Auto Process* dialog box will open.

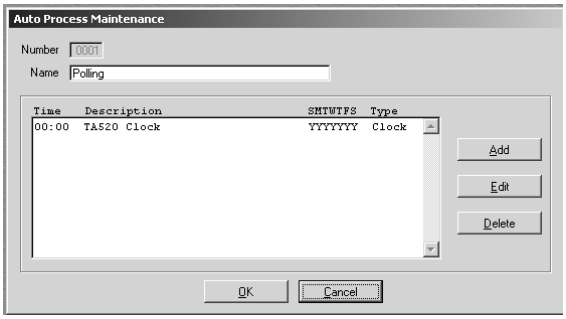


Figure 329: Configure Auto Process

2. Select the AutoProcess you wish to change.
3. Click the **Edit** button.
4. Edit the settings as described in the *Add an AutoProcess* section.

Delete an AutoProcess

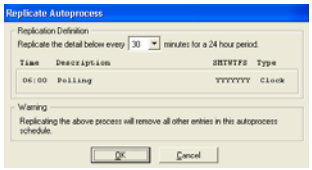
1. Click the **Clocks** menu**, AutoProcess**. The *Auto Process Maintenance* dialog box will open.
2. Select the AutoProcess you wish to delete.
3. Click the **Delete** button. You will be prompted:

Figure 330: Deletion Confirmation

4. Click **OK** to confirm the deletion.
5. Click **Close** to exit the dialog box.

Replicate an AutoProcess

1. Click the **Clocks** menu**, AutoProcess**. The *Auto Process Maintenance* dialog box will open.
2. Select the AutoProcess you wish to replicate.
3. Click the **Replicate** button. You will be prompted:



4. Define the minutes within a 24 hour period.
5. Click OK to confirm the replication.

Chapter XIII Utilities

This section describes the system utilities built into Genesis Pro. It includes importing and exporting, reindexing, system archiving, system backups, and more.

Importing

It is possible to import data from other programs. Employee data, time transactions, and departments can be imported from previous versions of the software as well as from other third party systems, spreadsheets, and payroll programs.

Advanced Import

Employee data and attendance reports from third party accounting systems, spreadsheets, and payroll programs can be imported into Genesis Pro. The original files may be in any number of formats including ASCII comma delimited, Excel, or Lotus 1-2-3. When imported, the data is appended to the specified system database file. The file types Genesis Pro Import supports are:

- Framework II (FW2)
- Microsoft Multiplan 4.01 (MOD)
- Paradox 3.5/4.0 (DB)
- Rapidfile (RPD)
- Lotus 123 versions 1 through 3 (WKS, WK1, WK3)
- Symphony version 1 through 1.2 (WRK, WR1)
- Microsoft Excel (XLS)
- Comma Delimited
- Tab Delimited
- Space Delimited
- System Data Format (SDF)
- Symbolic Link Format (SYLK)
- Data Interchange Format (DIF)
- FoxPro

1. Click the **File** menu**, Import, Advanced**. The *Configure Import* dialog box will open.

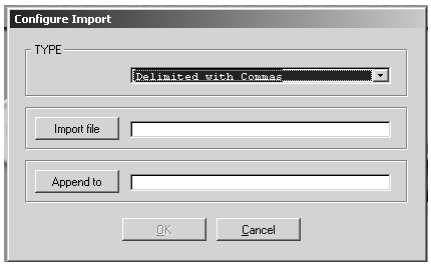


Figure 331: Configure Import

2. Select the type of file to be imported.
3. Click the **Import File** button to select the file that contains the information to be imported. The *Open* dialog box will open.

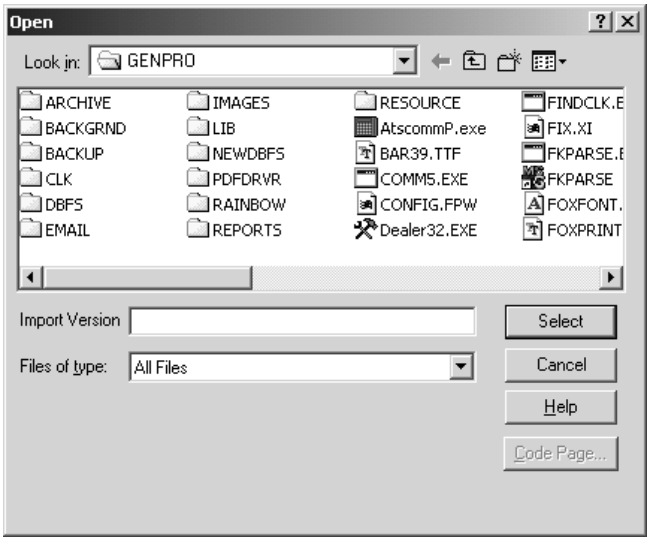


Figure 332: Open File

4. Navigate to and select the file you wish to import. The file must be of one of the types listed at the beginning of the Import section.
5. Click the **Select** button to commit the change.
6. Click the **Append To** button to select the table onto which this data will be appended. The *Open* dialog box will open.

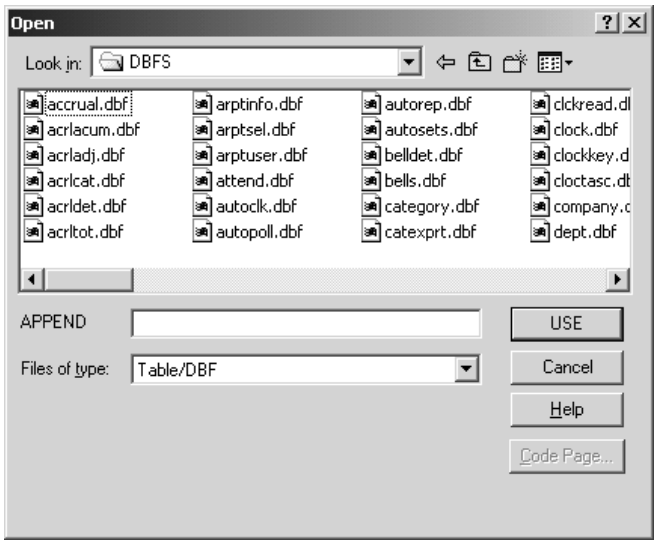


Figure 333: Open

7. Select the Genesis Pro database file to which you wish to append, and click the **USE** button to continue.
8. Click **OK** to begin the import process.

Import Benefits

1. Click the **File** menu**, Import, Benefits**. The *Import File* dialog box will open.

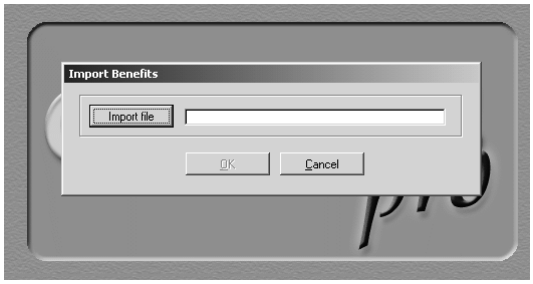


Figure 334: Import Benefits

2. Click the **Import File** button to select the file that contains the information to be imported. The *Open* dialog box will open.

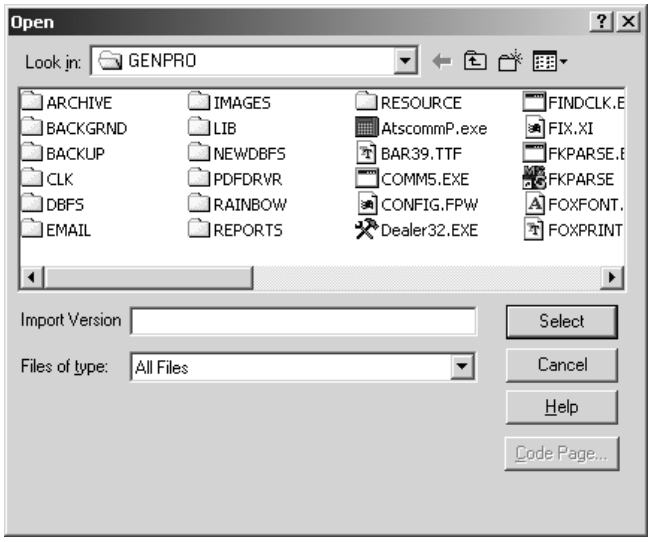


Figure 335: Open File

3. Navigate to and select the file you wish to import, then click the **Select** button to commit the change.
4. Click the **OK** button to begin importing employee data.

Exporting Data

The Export function allows you to extract data from Genesis Pro for use in other programs. When exported, the database files can be used with many commercial spreadsheet programs and report writers to generate custom reports. The supported applications are:

- Microsoft Multiplan 4.01 (MOD)
- Lotus 123 versions 1 through 2 (WKS, WK1)
- Symphony version 1 through 1.2 (WRK, WR1)
- Microsoft Excel (XLS)
- Comma Delimited
- Tab Delimited
- Space Delimited
- System Data Format (SDF)
- Symbolic Link Format (SYLK)
- Data Interchange Format (DIF)
- Database (FoxPlus)

1. Click the **File** menu**, Export**. The *Configure Export* dialog box will open.

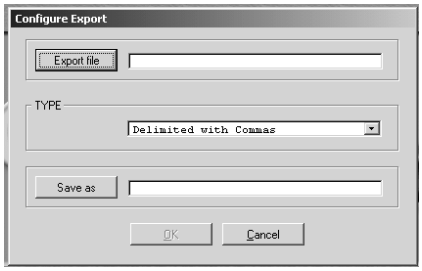


Figure 336: Configure Export

2. Click the **Export File** button. The *Open* dialog box will appear.

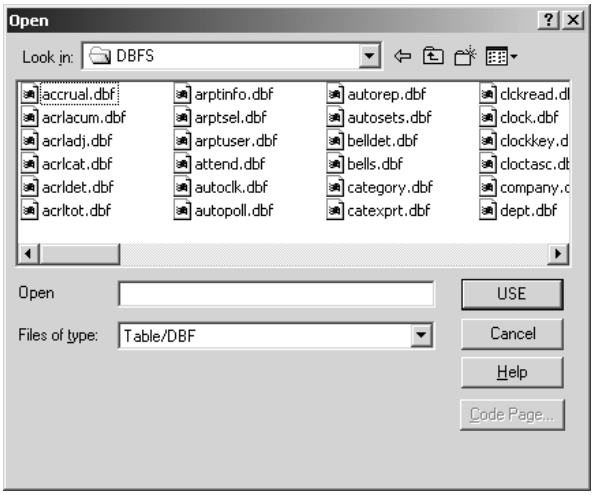


Figure 337: Open

3. Select the file you wish to export and click the **USE** button to continue.
4. Select the type of file you wish to export to. See above for a list of the available file types.
5. Click the **Save As** button to define the file name of the exported data. The *Save As* dialog box will open.

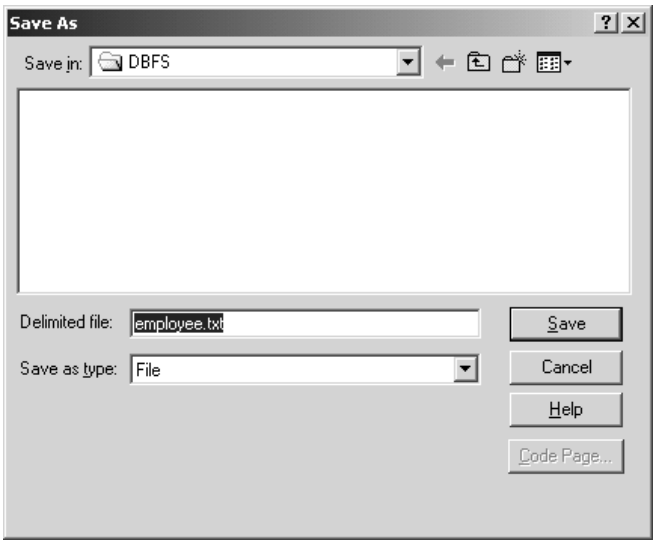


Figure 338: Save As

6. In the ***File Name*** box, enter the name you wish to use for the exported data file. The extension will fill in automatically based on the type of file chosen in the previous dialog box.
7. Click **Save** to continue.
8. Click **OK** to begin the export.

System Utilities

Genesis Pro provides utilities to keep your system running smoothly. Among other things, these utilities can repair databases, perform backups, and archive data for long-term storage.

Because these utilities affect data, and ultimately your payroll, contact your local representative if you have questions or concerns about the operation of a specific utility.

The following utilities are found under the Utilities menu under File and are described in this section:

- Reindex Databases
- Repair Databases
- Update Databases
- Initialize Databases
- Change Employee Number
- Change Employee Number Width
- Print Barcodes
- Set Reprocess Date
- Fix Unassigned Badges
- Restore Original Reports
- Repost R-Files
- Purge R-Files
- Post Historical Data
- Archive Data
- Restore Archived Data
- Back Up System Files
- Restore System Files

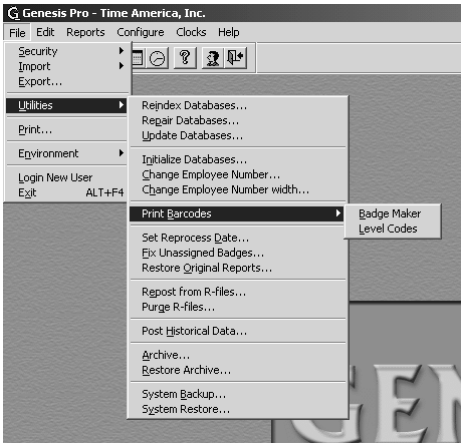


Figure 339: Utilities Menu

Reindex Database

The Reindex Databases utility removes deleted records and sorts the data base in either numeric or alphabetic order depending on the contents. Since this utility has the greatest impact on the speed and reliability of Genesis Pro, it is recommended that you develop a weekly schedule for reindexing system database files. Also, it is a good idea to Repair the database prior to Reindexing. Repairing fixes inconsistencies and potential problems in the data. See ***Repair Databases***, page 407.

TIP: Reindex can be set as an AutoProcess. See ***Configure an AutoProcess***, page 390.

1. Click the **File** menu**, Utilities, Reindex Databases**. The *Reindex Selection* dialog box will open.

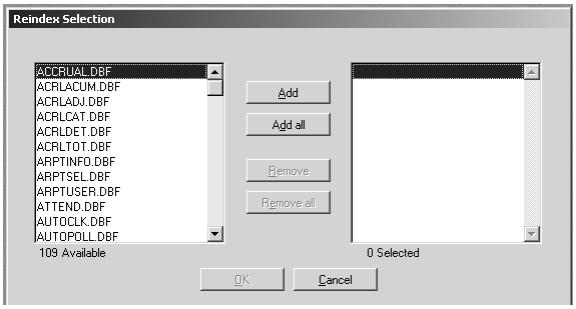


Figure 340: Reindex Selection

2. Select the database you wish to reindex by clicking **Add** to select an individual database or **Add All** to add all. It is recommended that you reindex all files.
3. Click **OK** to begin the reindexing process.

Repair Database

The Repair Databases utility compares the contents of the database to the database's index and attempts to rebuild the index to compensate for any inconsistencies. This utility cannot replace or recover data that has been lost or corrupted.

It is recommended that you repair your Genesis Pro databases prior to Reindexing in order to ensure that the data is optimized.

1. Click the **File** menu**, Utilities, Update Databases**. The *Repair Selection* dialog box will open.

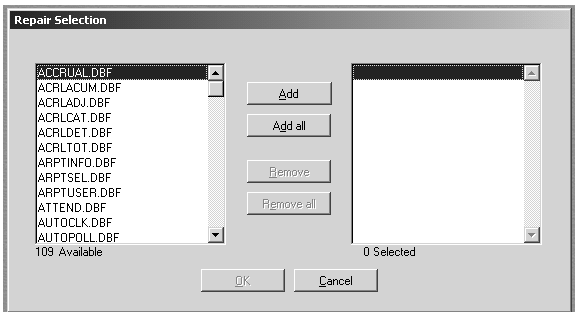


Figure 341: Repair Selection

2. Select the database you wish to repair by clicking **Add** to select an individual database or **Add All** to add all. It is recommended that you repair all files.
3. Click **OK** to begin the repairing process. A progress bar will show the percentage of completion

Update Databases

The Update Databases utility is used when upgrading Genesis Pro to a newer version of the software. It makes all the required modifications to your current database so that it operates with any new file structures.

1. Click the **File** menu**, Utilities, Repair Databases**. The ***Update and Compare*** prompt will appear.

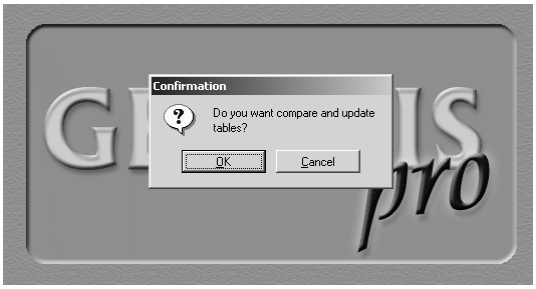


Figure 342: Repair Selection

2. Click **OK** to begin the updating process.

Initialize Databases

The Initialize Databases utility completely removes the contents of database files. This utility is useful when databases become corrupted beyond recovery

NOTE: This utility completely deletes ALL data in the selected databases. Only the SYSOP is able to initialize data.

1. Click the **File** menu**, Utilities, Initialize Databases**. The *Initialize Selection* dialog box will open.

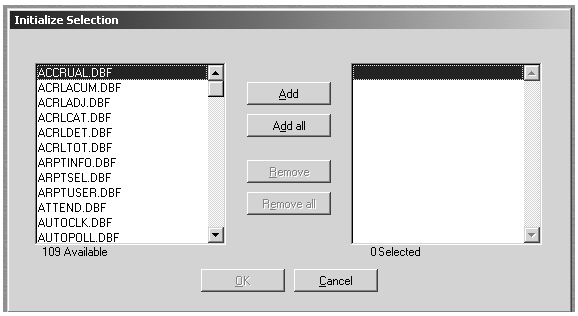


Figure 343: Initialize Selection

2. Select the database you wish to initialize by clicking **Add** to select an individual database or **Add All** to add all.
3. Click **OK** to begin the process. **ALL DATA IN THE SELECTED TABLES WILL BE DESTROYED.**

Change Employee Number

Once an employee has been added to the system, you can no longer change his or her employee number through the Configure Employees Detail screen. This utility allows you to change employee numbers, one employee at a time.

1. Click the **File** menu**, Utilities, Change Employee Number**. The *Change Employee Number* dialog box will open.

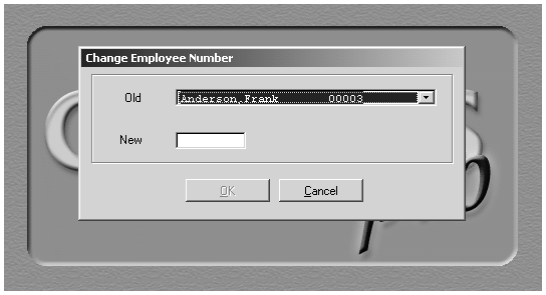


Figure 344: Change Employee Number

2. Select the employee whose number you wish to change using the drop-down list in the **Old** field.
3. Enter the new employee number in the **New** field.
4. Click **OK** to change the employee's number.

Change Employee Number Width

The number of digits (width) in the Employee Number is initially defined in the Configure Main Company dialog box. However, once employees have been added you can no longer change the setting through the Main Company screen. This avoids accidental data loss.

This utility allows you to change the number of digits for Employee Numbers safely. Typically, the width should only be changed to a higher (longer) number in order to avoid

losing data. When digit length is increased, the digits are added on to the left of the current number. When digits are taken away, they are taken from the right.

1. Click the **File** menu**, Utilities, Change Employee Number Width**. The *Change Employee Number Width* dialog box will open.

Figure 345: Change Employee Number Width

2. Enter the number of digits for the new employee number.
3. Click **OK** to commit the change.

Print Barcodes

The Print Barcodes utility allows you generate barcodes for Employee Numbers, as well as Department, Job, Step, Operation, and Task Numbers. Using this utility you can create your employee badges or create bar-code sheets that employees can use to scan in Department, Job, Step, Operation, and Task (rather than having to key the numbers in manually.) This can save time and effort at the clock, not to mention helping to ensure that the numbers entered are accurate.

Badge Maker

The Badge Maker allows you to print Employee Numbers as bar codes suitable for creating employee badges.

1. Click the **File** menu**, Utilities, Print Barcodes, Badge Maker**. The *Select Employee* dialog box will open.

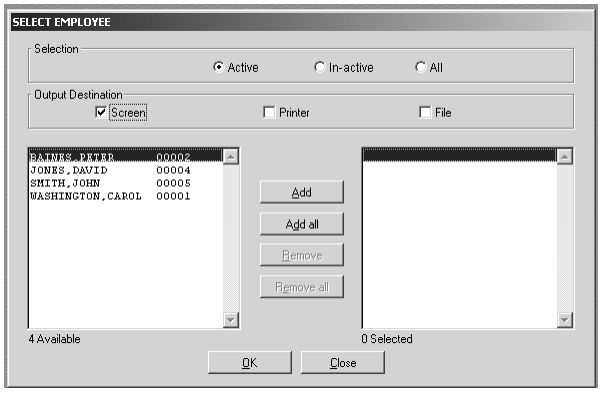


Figure 346: Select Employee

2. Fill in the settings as appropriate:

Setting	Definition
Selection	Select the status of employee to be printed. The options are: **Active**: Prints barcodes for active employees only. **Inactive**: Prints barcodes for inactive employees only. **Both**: Prints barcodes for both active and inactive.
Output Destination	Select where you want the completed barcodes to go. The options are: **Screen**: Previews the badges on screen, from which you can print. **Printer**: Sends the badges directly to the printer. **File**: Sends the badges to an external file.
Employees	Select the employee(s) for whom you wish to make badges. Click the **Add** button to add the selected employee, or the **Add All** button to add all employees.

3. Click **OK** to create the badges. The badges will be sent to the Output Destination selected.

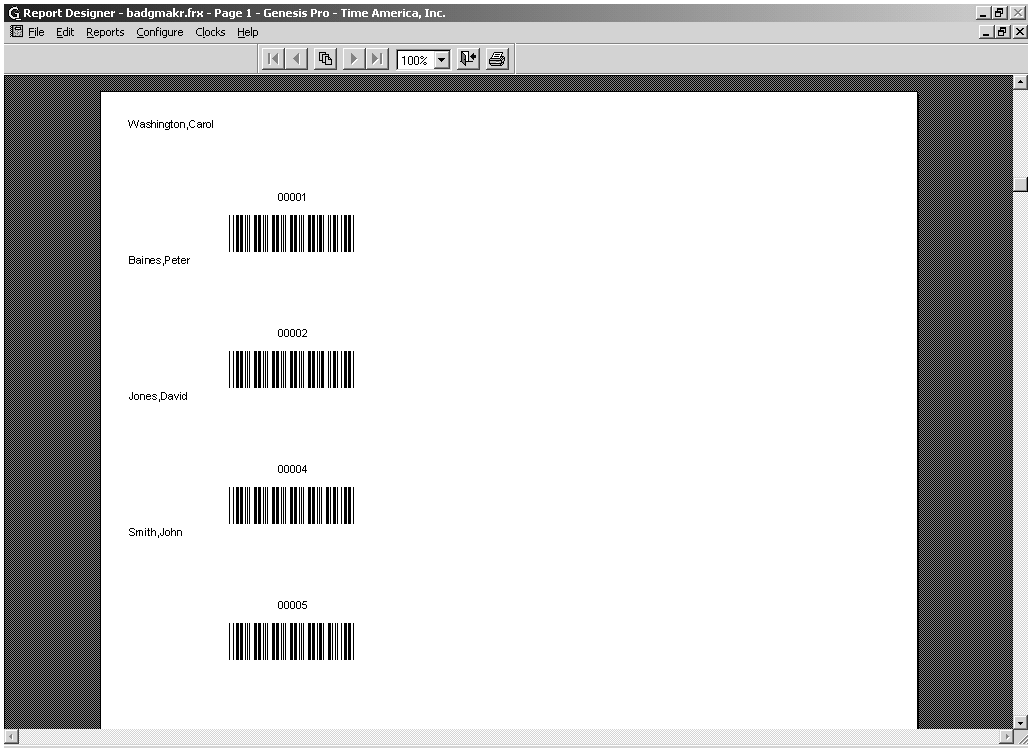


Figure 347: Completed Badges

4. Click **Close** to exit the dialog box.

Level Codes

The Print Level Codes utility generates labels that contain barcodes for the different Department, Jobs, Steps, Operations, and Tasks (if applicable) in your database.

1. Click the **File** menu**, Utilities, Print Barcodes, Level Codes**. The *Select Level* dialog box will open. (The title of this dialog box will reflect the current level chosen).

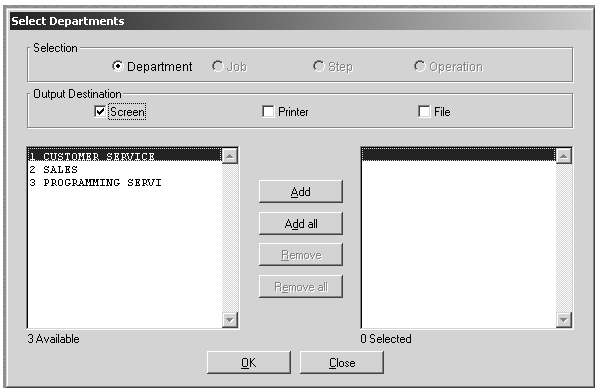


Figure 348: Select Level

2. Fill in the settings as appropriate:

Setting	Definition
Selection	Select the level to be printed. The options are Department, Job, Step, Operation, and Task (if Job Costing is in Use).
Output Destination	Select where you want the completed barcodes to go. The options are: **Screen**: Previews the badges on screen, from which you can print. **Printer**: Sends the badges directly to the printer. **File**: Sends the badges to an external file.
Items	Select the items(s) for which you wish to make badges. Click the **Add** button to add the selected item, or the **Add All** button to add all items.

3. Click **OK** to create the badges. The badges will be sent to the Output Destination selected.

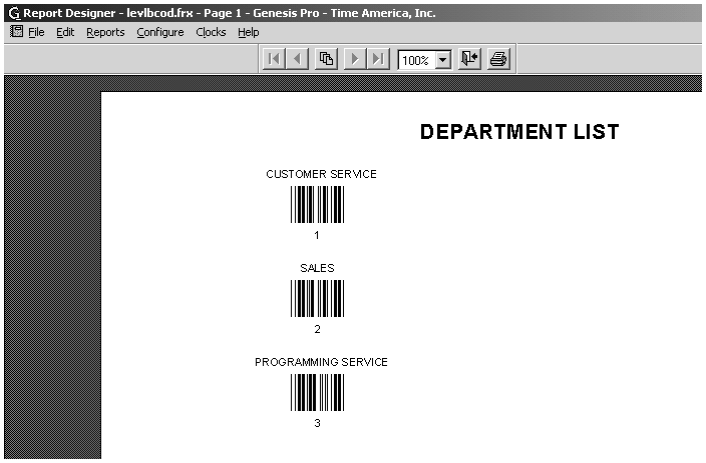


Figure 349: Completed Badges

4. Click **Close** to exit the dialog box.

Set Reprocess Date

The Set Reprocess Date utility allows you to globally reset the reprocess date for employees.

Processing occurs when Genesis Pro takes the punches from a clock and applies them to the correct employee, taking into account pre-setup information such as Company Policy, Shift rules, etc. Reprocessing is what happens when a user has made changes to the polled punches, and/or configuration information, and now needs to have Genesis Pro recalculate the data. If Genesis Pro had to recalculate data every time a user opened an employee timecard, the usefulness of the program would be offset by the amount of time needed for the calculations. Time is saved by allowing a user to make all necessary changes before reprocessing the data, which is the driving reason behind having automated timekeeping software.

This utility does not actually reprocess the punches. It allows a user to decide how far back, and for whom, the system will process punches. After changing this setting, you will need to manually reprocess, at which time the system will reprocess back to the date entered here for the employees selected.

1. Click the **File** menu**, Utilities, Set Reprocess Date**. The *Reprocess Punches* dialog box will open.

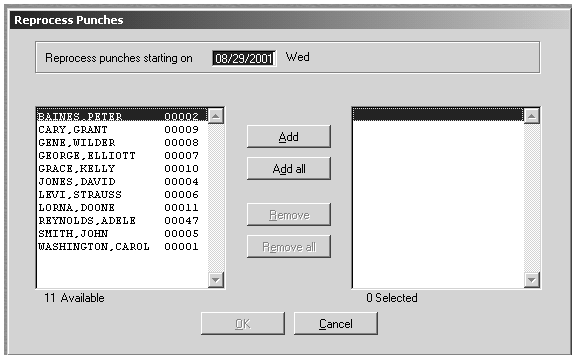


Figure 350: Reprocess Punches

2. Enter the ***Reprocess*** date.
3. Select the employees for whom you wish to reprocess by using the **Add** button to select an individual employee or **Add All** to select all.
4. Click **OK** to complete the change.
5. Reprocess punches. This can be accomplished by clicking the **Reprocess** button in the *Online Timecard*. See ***Online Timecard***, page 251. Or by running a report with the **Reprocess** button selected.

Fix Unassigned Badges

Employees are able to start punching at the clocks before their data is entered into Genesis Pro. The badge used by the employee is considered to be unassigned if the employee's punches are polled prior to the employee being added to the software. You can repost the employee's punches after adding the employee to the software using this utility.

1. Click the **File** menu**, Utilities, Fix Unassigned Badges**. The *Unassigned Badge Maintenance* dialog box will open.

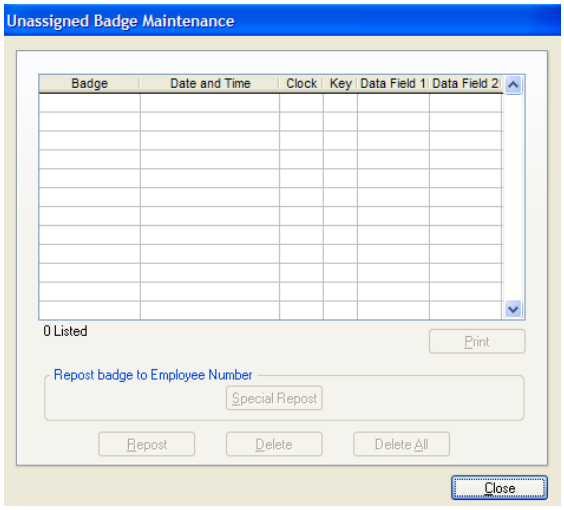


Figure 351: Unassigned Badge Maintenance

2. This screen will show the employees whose badges were unassigned at the time of polling.
3. Select the employee you wish to repost. Make sure that this employee is added to the program at this time and has the correct badge number. You may also click **Print** to view a list of all unassigned badges.
4. Click the **Repost** button. Genesis Pro will match the badge in the transaction to a badge assigned to the employee.
5. The Special Repost option will compare the listed **badges** to current **employee numbers** (rather than comparing to a badge number). It assigns any transaction to the employee whose employee number matches the unassigned badge number. This option should only be chosen after a regular reposting.
6. Click **Close** to exit the dialog box.

Restore Original Reports

This utility enables you to reinstate the factory definitions of all reports. This will overwrite any customization you may have done to reports. This is useful when reports have been corrupted.

NOTE: This utility removes data (customized reports). Use it very carefully.

1. Click the **File** menu**, Utilities, Restore Original Reports**. The *Restore Original Reports* dialog box will open.

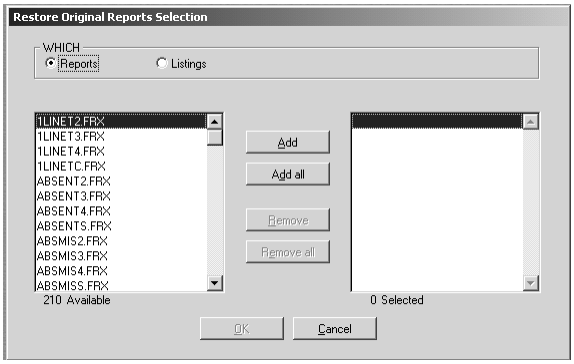


Figure 352: Restore Original Reports

2. Select the type of report you wish to view: ***Reports*** or ***Listings***. The list will display the items of the type chosen.
3. Select the report(s) you wish to restore by clicking the **Add** button to add an individual item or **Add All** to choose all.
4. Click **OK** to restore the report(s).

Repost from R-Files

R-Files are the files that store punch data downloaded from the clocks. There is one R-File for each day, which contains all the punches from that day. This data is imported into Genesis Pro, but the original file is kept so that it can be referenced or re-imported if necessary. Reposting an R-File allows you to re-import the punch data stored in one of these files.

1. Click the **File** menu**, Utilities, Repost from R-Files**. The *Repost R-Files* dialog box will open.

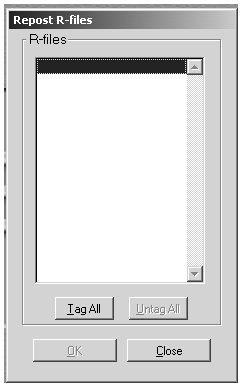


Figure 353: Repost R-Files

2. Select the file you wish to repost by double-clicking it to "tag" it. Or select all files by clicking the **Tag All** button.
3. Click **OK** to repost the files.

Purge R-Files

R-Files are the files that store punch data downloaded from the clocks. There is one R-File for each day, which contains all the punches from that day. This data is imported into Genesis Pro, but the original file is kept so that it can be referenced or re-imported if necessary. These files are kept indefinitely, taking up space on your hard drive. You may wish to purge (delete) these files periodically in order to free up disk space.

This should not be done before a particular R-File has been successfully imported to Genesis Pro, as doing so will result in a loss of the punches contained in the R-File.

1. Click the **File** menu**, Utilities, Purge R-Files**. The *Purge R-Files* dialog box will open.

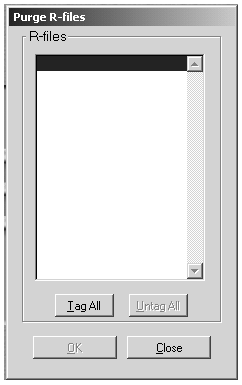


Figure 354: Purge R-Files

2. Select the file you wish to purge by double-clicking it to "tag" it. Or select all files by clicking the **Tag All** button.
3. Click **OK** to purge the files.

Post Historical Data

Posting Historical Data allows you to move historical information to another location, where it can still be accessed for reports, but where it is not slowing down the performance of the program. You must also Post Historical Data prior to archiving it. (See ***Archive***, page 417).

Genesis Pro keeps track of a large amount of information. As the number of employees goes up, the amount of data that pertains to those employees goes up. After awhile, the amount of data that needs to be processed will noticeably slow down the computer. Genesis Pro allows a user to decide when past transactions will no longer be needed for editing, and 'saves' the processed punches to another file. The transactions in this new file cannot be edited in any way.

Posted transactions will appear in reports, but will not appear in online timecards or transactions screens. If the transactions do need to be edited, they will need to be unposted. The difference between posting data and archiving data is posted data will appear on reports, archived data will not. Data cannot be archived until it has been posted.

1. Click the **File** menu**, Utilities, Post Historical Data**. The *Post Historical Data* dialog box will open.

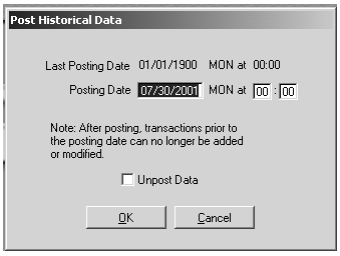


Figure 355: Post Historical Data

2. Enter the date up to which you wish to post data. As posted data can no longer be edited on screen, make sure that the date entered is far enough in the past to suit your needs.
3. If you wish to Unpost previously posted data (in order to edit it, for example), check the ***Unpost*** data box.
4. Click **OK** to complete the action

Archive

The Archive utility removes time and attendance data from your system and stores it in another location for archive purposes. Unlike the System Backup utility that only *copies* files, the Archive utility copies specific data, then deletes it from the system to free up more of the hard drive space.

You must Post Historical Data prior to archiving. See above.

1. Click the **File** menu**, Utilities, Archive**. The *Archive Maintenance* dialog box will open.

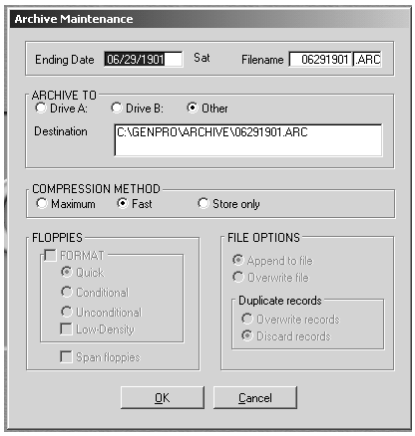


Figure 356: Archive Maintenance

2. Fill in the settings as appropriate:

Setting	Definition
Ending Date	Enter the date up to which to archive. Database files are archived prior to this user-defined date. The ending date must be at least 14 days earlier than the Posting\Unposting Historical Data date. For example, if you want to archive data from 1999, you would input 12/31/1999. If this is the first time you are archiving, the archive file will consist of all the data from January 01, 1900 to the selected date.
FileName	Enter a name for the archived file. The Filename can be any combination of characters up to 8 digits long. The default name for this file is the Ending Date of the archive.
Archive To	Select the destination drive for the file. The options are: **Drive A**: Typically a floppy drive. **Drive B**: Typically a floppy drive. **Other**: Can be the local hard drive or any network drive.
Destination	Enter the destination drive letter and directory for the archived file.
Compression Method	Select the Compression method for the archived data. The options are: **Maximum**: Saves as much disk space as possible, but takes longer. **Fast**: Compresses quickly with high data integrity, and is the default option **Store Only**: Does not compress data, but stores it all in one file.

Format	If Drive A or B are selected, these settings will become available. Genesis Pro will format the floppy drive prior to copying the archived file onto it. Choose the method of formatting desired. The options are: **Quick**: Deletes all information on the drive, without formatting **Conditional**: Saves the table that is on the disk. **Unconditional**: Deletes everything on the disk, and reformats **Low Density**: Formats a low density disk, which almost never heard of anymore and should only be used by knowledgeable users
Span Floppies	Select this option if Genesis Pro should split a large archive file so that it can be "spanned" over more than one floppy disk. You will be prompted to insert disks as needed.
Append to File	Select this option to have new archive information add to an existing archive file of the same name.
Overwrite File	Select this option to have new archive information overwrite an existing archive file of the same name.
Overwrite Records	If append to file is selected, you will need to decide how duplicate records should be handled. Select this option to overwrite existing duplicate records with new information.
Discard Records	Select this option to discard the new duplicate records and keep the existing records.

3. Click **OK** to complete the Archive.

Restore Archive

Archived data is data that has been removed from the Genesis Pro software, but has not been deleted. The only information that is stored in an archive is transactions and schedules. This information can be added back into Genesis Pro by Restoring the Archive. If the information is going to be edited, the Post Historical Data utility needs to be run after Restoring from Archive to unpost the data and make it available for edits.

Genesis Pro archive files ending with ".ARC". It is important to note that when restoring an archive, the archive does not get deleted or altered in any way. It still exists in the same state as before the restoring process. The transactions in the archive are copied into the appropriate Genesis Pro database. It is possible to restore individual employees from the archive.

1. Click the **File** menu**, Utilities, Restore Archive**. The *Restore Archive Maintenance* dialog box will open.

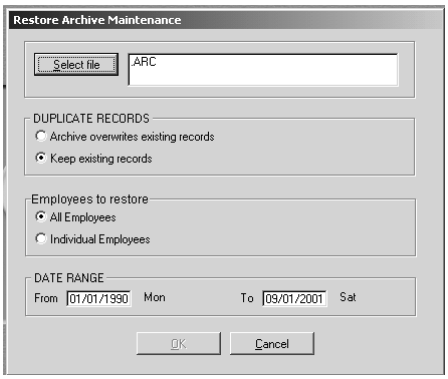


Figure 357: Restore Archive Maintenance

2. Fill in the settings as appropriate:

Setting	Definition
Select File	Click the **Select File** button to choose the Archive file you wish to restore.
Archive overwrites existing records	Check this option to have Genesis Pro overwrite duplicate records with the archived data.
Keep existing records	Check this option to have Genesis Pro keep existing records and ignore the duplicate archived data.
All Employees	Check this option to restore data for all employees.
Individual Employees	Check this option to restore data for individuals. You have the opportunity to choose employees after clicking the **OK** button.
Date Range	Enter the date range for which you wish to restore records. **TIP**: To restore all transactions for the chosen employees contained in this archive, put in 01/01/1900 in the first field and today's date in the second field.

3. Click **OK**. If All Employees was selected, the restoration process will begin immediately. If Individual Employees was selected, you will be prompted to select the employees, after which the restoration will begin.

System Backup

System Backup takes a copy of the database files as of the date of the backup. These backup files can be restored if necessary. If for some reason the computer/network crashes, the data can be loaded into a new or existing installation of Genesis Pro with no downtime. Backing up Genesis Pro should be done on a regular basis.

1. Click the **File** menu**, Utilities, System Backup**. The *System Backup Maintenance* dialog box will open.

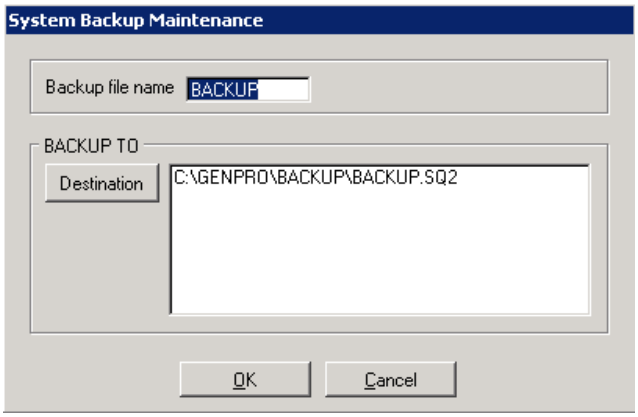


Figure 358: System Backup Maintenance

2. Fill in the settings as appropriate:

Setting	Definition
Backup File Name	Enter the name you wish to use to refer to this backup file. A good practice is use the date of the backup as the file name.
Backup To	Select the destination drive for the file. The options are: **Drive A**: Typically a floppy drive. **Drive B**: Typically a floppy drive. **Other**: Can be the local hard drive or any network drive.
Destination	Enter the destination drive letter and directory for the backup file.

3. Click **OK** to begin the backup.

System Restore

System Restore restores your Genesis Pro database files from backup. When Restoring a Backup, all changes made after the backup was performed will be lost. If a clock has been polled after the backup was performed, the transactions from that polling will have to be reposted.

1. Click the **File** menu**, Utilities, System Restore**. The *System Restore Maintenance* dialog box will open.

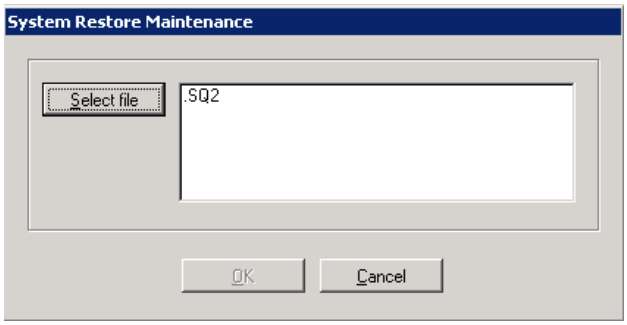


Figure 359: System Restore Maintenance

2. Click on the **Select File** button to select the file to be restored.
3. Click **OK** to begin the restoration process.

Additional Utilities

Genesis Pro provides some "nice-to-have" utilities in addition to the System Utilities, including:

- Calculator
- About
- Conversion Table
- System Info
- Macros

These utilities are found under the Help menu.

Figure 360: Help Menu

Calculator

1. Click the **Help** menu**, Calculator**. The *Calculator* will open.

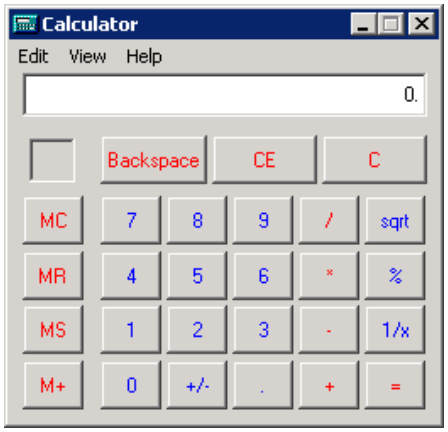


Figure 361: Calculator

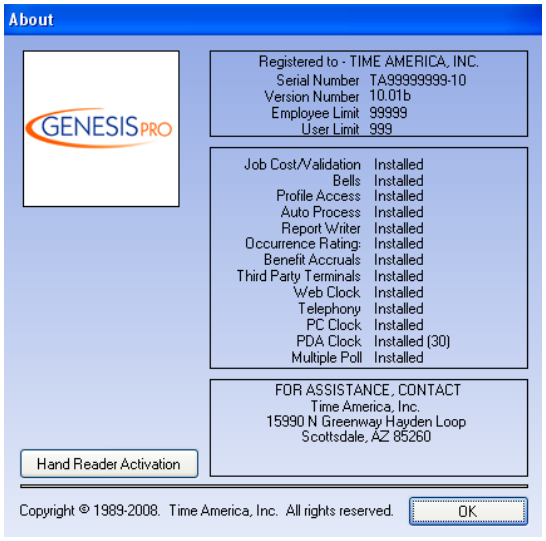
2. You may enter numbers and functions by typing or by clicking the appropriate buttons on the keypad.

About

The About screen displays the serial number information and all extra modules the client has purchased. This is also where you can activate the Hand Reader.

NOTE: This only applies to Hand Readers that do not match the Time America internal code and were not purchased directly from Time America.

1. Click the **Help** menu**, About**. The *About* will open.
2. Click on Hand Reader Activation button as shown below.



System Configuration

The System Configuration screen displays the technical setup of your computer.

1. Click the **Help** menu**, System Configuration**. The *System Configuration* window will open.

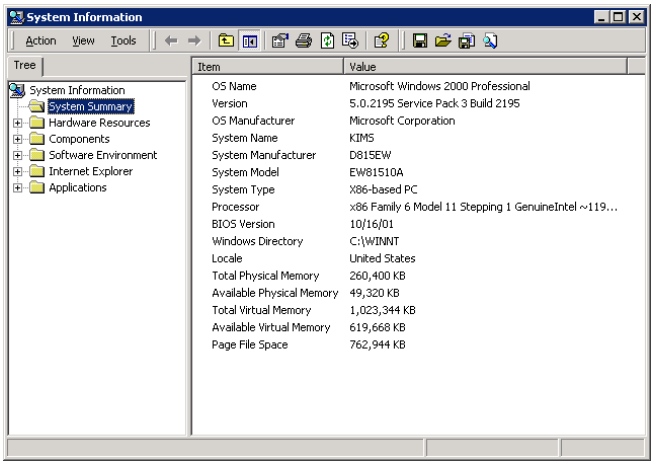


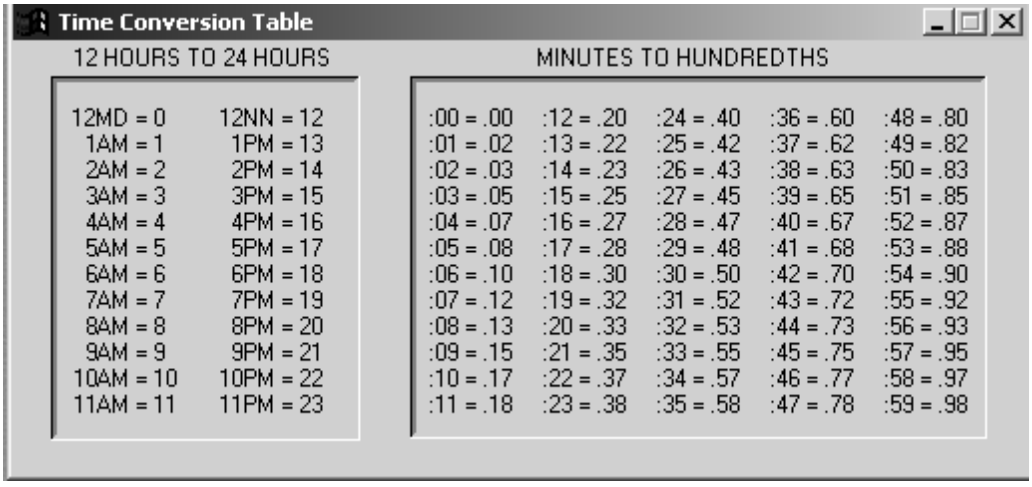
Figure 362: System Configuration

2. Press the **Close** button, , to exit the dialog box.

Conversion Table

The Conversion Table displays conversions from 12 Hour to 24 Hours and minutes to hundredths of an hour.

1. Click the **Help** menu**, Conversion Table**. The *Conversion Table* will open.



Macros

Macros allow you to record keyboard steps in Genesis Pro and play them back by pressing a key. For example, you could record a macro to Poll time clocks.

1. Click the **Help** menu**, Macros**. The *Record Macro* dialog box will open.

Figure 363: Record Macro

2. Press the key or key combination that will run this macro.
3. Enter a name for the macro (no spaces.)
4. Click **OK** to begin recording.
5. Perform the steps you wish to record. Type the keystrokes you normally press to perform an operation on the keyboard. Remember, only keyboard operations can be recorded.
6. Press **Shift + F10** to stop recording. The *Stop Recording Macro* dialog box will open.

Figure 364: Stop Recording

7. Click one of the following:

Setting	Definition
OK	Click **OK** to stop recording the macro.
Continue	Click continue to continue recording the macro after a pause.
Discard	Click **Discard** to cancel recording and discard the macro.

Setting	Definition
Insert Literal	Click **Insert Literal** to record the literal meaning of the next keystroke. For example, if CTRL+P is used to execute a macro, but you want to record CTRL+P as a keystroke, click Insert Literal before typing the keystroke. This prevents a macro from being recorded.
Insert Pause	Click this button to insert a pause into the macro, then select the Key to Resume or Seconds option below.
Key to Resume	Select this option to pause the macro until SHIFT+F10 is pressed to continue.
Seconds	Click **Seconds** to pause the macro for a period of time (in seconds). Enter the number of seconds in the adjacent field.

INDEX

Additional Employee Features 168
Additional polling key 17
Approval Editor 266, 270
Archive 417
  restore 419
ATS 357
  configure 357
Attendance 45
Attendance codes
  add 46
  configure 45
  delete 47
  edit 46
Attendance Infractions
  reporting 155, 166
Attendance Notices 162
  add 160
  customize notice 160
  delete 162
  edit 162
Audit Trails 263
Automatic Processes 392
AutoProcess 392
  add 393
  delete 399
  edit 398
AutoProcessing 388
Background
  change 25
Backup 420
  restore 421
Badges 239
  add 239
  delete 240
  edit 240
  employee 239
Barcodes 410
Bell Schedules 117, 165
  add 118
  configure 117
  edit 119
Benefit Accruals 146, 166
  add 152
  adjust 230
  configure 147
  delete 231
  details 228
  edit 154
  update 228
  update to current 155
Benefit Accumulators
  configure 149
Benefit Entitlement
  configure 177, 224
  delete 226
  details 225
  grant 226
Benefits 146, 166
  accumulators 149
  configure 227
  employee 224
Categories 39
  add 43
  configure 40
  delete 44
  edit 44
Category and Attendance Infractions
  add 158
  delete 160
  edit 160
Change Employee Number 409
Change Employee Number Width 409
Change Password 146
Clocks 304
  adding 379, 384
  ATS 357
  ATS, configure 357
  auto polling 392
  connections 304
  customize 370
  Deleting 380, 386
  editing 380, 385
  function keys 370
  Hand Reader 362
  Hand Reader, configure 362
  polling 388
  TA500/600 Series 305, 321
  TA500/600 Series, configure 305, 321, 335, 342
  TASC 350
  TASC, configure 350
Configuration 27
  attendance 45
  Bell Schedules 117, 165
  Benefits 146, 166
  categories 39
  Departments 92, 97
  Divisions 36
  Groups 87, 125
  Holidays 83
  Job Costing 165
  Main Company 28
  Occurrence Ratings 155, 166
  Policies 48
  Profile Lockouts 121, 166
  Rounding 65
  Security 127
  shifts 72
Configure Users 140
Databases

INDEX, Cont.

initialize....408
reindex....407
repair....407
update....408
Delete a Occurrence Rating....158
Delete an Attendance Code....47
Demonstration (demo) key....18
Departments....92, 97
add....95
configure....92
delete....96
edit....96
Differential
configure....61
Divisions....36
add....37
configure....36
delete....37
edit....37
Edit/Add Start....258
Edit/Add Stop....259
Editing time records....251
Email....297
Employee Details
configure....245
Employee info....245
Employee Level Wage
add....237
edit....238
Employee Maintenace
Benefits....224
Timecard....207
Employee Maintenance....204
Badges....239
configure employee....204, 205
Details....245
Messages....231
Profiles....240, 243
Schedule....211
Status....221
Transactions....175, 220
Wages....234
Employee Reviewer....168
Employee settings....245
Employee Status
configure....221
Employee Timesheets....178
Employees....204, 205
add....248
badges....239
benefits....224
delete....249
details....245
edit....249
messages....231
profiles....240, 243
schedule....211
selecting....272, 273
Status....221
transactions....175, 220
wages....234
Environment
bell tones....25
change background....25
large button toolbar....26
Ethernet....304
Exceptions
configure....62
Exiting Genesis Pro....20
Exporting....404
From Schedule....262
Function Keys
classes....372
customize....370, 375
functions....371
predefined....371
Getting Started....19
Global....272
message assignment....273
profiles....274, 275
schedule assignment....276
schedules....277, 279, 280
transactions....282
Global Wages
delete....236
edit....236
Groups....87, 125
add....88, 126
configure....87, 125
delete....89, 126
edit....89, 126
Hand Reader....362
configure....362
Hardware keys
additional polling....17
demonstration (demo)....18
System key....17
Hardware requirements....11
Help....23
Contents....23
Find....24
Index....23
online....23
Print....24
Historical data....417
Holidays....83
add....84, 86
configure....83, 85
configure pay options....51
delete....85, 87, 223
edit....84, 86
Importing....400

Advanced....400
Benefits....402
In/Out on Service....58
Initialize....408
Installation....11
hardware keys....17
instructions....11
system requirements....11
Job Costing....91, 165
add jobs....101
add Operations....110, 115
add Steps....105
configure jobs....98
configure Operations....107, 112
delete jobs....101
edit jobs....101
edit Operations....111, 116
edit Steps....106
Jobs
add....101
configure....98
delete....101
edit....101
Keyboard....21
Keyboard usage
programmed keys....22
shortcut keys....22
underlined letters....22
Keys
hardware....17
programmed....22
shortcut....22
Last Punch....269
Logging In....19
Main Company....28
Manual
about....10
Messages....231
add....232
configure....231
delete....233
edit....233
global....273
Modem....304
Multiple Misc.....259
Multiple Miscellaneous....259
Occurrence Ratings....155, 166
add....157
category and attendance infractions....158
configure....155
edit....158
Online Timecard....251
accessing....251
navigating....252
Operations....107
add....110, 115
configure....107, 112
delete....111, 116
edit....111, 116
Optional Modules....165
Bell Schedules....117, 165
Benefits....146, 166
Job Costing....165
Occurrence Ratings....155, 166
Profile Lockouts....121, 166
Overtime
configure....54
Passwords
change....146
Pay Period
configure....49
PC Clock....167
clocking in and out for the day....181
who can use....181, 184
Per diem
configure....59
Policies....48
add....63
configure....48
delete....64
differential....61
edit....63
exceptions....62
holidays....51
In/Out on service....58
overtime....54
pay periods....49
per diem....59
punch defaults....49
Polling....388
Print
configure printer....284
Printing....284
Profile Lockouts....121, 166
add....123
assign....240, 243
configure....121
delete....124
edit....124
global....274, 275
Profiles....121, 166, 240, 243
add....241
configure....240, 243, 244
delete....243
edit....242
global....274, 275
Programmed keys....22
Punch defaults
configure....49
Reindex....407
Repair....407
Report Editor....298

INDEX, Cont.

Reports....284, 285
  copy....300
  delete....303
  edit....302
  editor....298
  emailing....297
  individual....290
  maintenance....299
  range....285
  relocate....299
  restore....415
  running....285
  scheduling....392
Reprocess....413
Reprocess Date....413
Requirements, hardware....11
Restore....421
R-Files
  purge....416
  repost....415
Rounding....65
  configure....65
Rounding Rules
  add....70
  delete....70
  edit....70
Running a Report
  by individual....290
  by range....285
Schedules....211
  assign....213
  copy....217
  delete....215
  employee....211
  global....276, 277, 279, 280
  rotating....215
  template....217
Security....127
  add a user....144
  change password....146
  configure levels....127
  configure users....140
  User Maintenance....140
  who's logged in....146
Security Levels
  add....139
  configure....127
  delete....140
  edit....139
Serial....304
Set Date and Time....386
Shift Group
  add....80
  configure....72
  delete....81
  edit....80
Shifts....72
  add....81
  delete....82
  edit....81
  shift group....72
Shortcut keys....22
Starting Genesis Pro....19
Status....221
  add....222
  edit....223
  employee....221
Step Costing
  configure Steps....102
Steps....102
  add....105
  configure....102
  delete....106
  edit....106
Support
  Technical....10
System
  requirements....11
System Environment
  customizing....25
System Requirements....11
System Utilities....406
TA500 Series....305, 321
  configure....305, 321, 335, 342
TA520/530....305, 321
TA600 Series....305, 321
  configure....305, 321, 335, 342
TA620....305, 321
TASC....350
  configure....350
Tasks....112
Technical support....10
Terminals....304
  connections....304
Third Party Terminals....167
Timecard....251
  accessing....251
  description....207
  navigating....252
  online....251
Timecards....251
Tips and Techniques....21
Toolbar
  displaying large buttons....26
Transactions....251, 253, 263
  add....254, 255, 258, 259, 262
  adding....253
  deleting....263
  description....175, 220
  edit....257, 258, 259
  editing....253, 266, 270
  global....282

© January 2009 Time America, Inc.

navigating 253
Unassigned Badges 414
Underlined letters 22
Update 408
User Accounts
SYSOP 19
User Maintenance 140
Users 19
add 144
delete 145
edit 145
Utilities 400
additional 422
system 406
Videx DuraTrax 167
Wages 234
add 236
configure 234
WebClock 167, 184
Who's Logged In 146